

2015

# Living with Purpose in Retirement: An Interpretive Multi-Case Study

Joseph P. Zandlo

Follow this and additional works at: [http://ir.stthomas.edu/caps\\_ed\\_orgdev\\_docdiss](http://ir.stthomas.edu/caps_ed_orgdev_docdiss)



Part of the [Education Commons](#), and the [Organizational Behavior and Theory Commons](#)

---

## Recommended Citation

Zandlo, Joseph P., "Living with Purpose in Retirement: An Interpretive Multi-Case Study" (2015). *Education Doctoral Dissertations in Organization Development*. 40.

[http://ir.stthomas.edu/caps\\_ed\\_orgdev\\_docdiss/40](http://ir.stthomas.edu/caps_ed_orgdev_docdiss/40)

This Dissertation is brought to you for free and open access by the School of Education at UST Research Online. It has been accepted for inclusion in Education Doctoral Dissertations in Organization Development by an authorized administrator of UST Research Online. For more information, please contact [libroadmin@stthomas.edu](mailto:libroadmin@stthomas.edu).

Living with Purpose in Retirement: An Interpretive Multi-Case Study

A DISSERTATION

SUBMITTED TO THE FACULTY OF THE SCHOOL OF EDUCATION  
OF THE UNIVERSITY OF ST THOMAS

By

Joseph P. Zandlo

IN PARTIAL FULFILLMENT OF THE REQUIREMENTS

FOR THE DEGREE OF

DOCTOR OF EDUCATION

June 2014

UNIVERSITY OF ST THOMAS

We certify that we have read this dissertation and approved it as adequate in scope and quality. We have found that it is complete and satisfactory in all respects, and that any and all revisions required by the final examining committee have been made.

Dissertation Committee

---

John Conbere, EdD, Committee Chair

Date

---

Alla Heorhiadi, PhD, EdD, Committee Member

Date

---

Jane W Canney, EdD, Committee Member

Date

## ACKNOWLEDGMENTS

In the journey we call life, there are people that can affect your decisions and outcomes in ways they may never had intended. A decision to pursue a doctorate degree comes not only with a great deal of thought, but a lifetime of experiences that shape who you are, and prepare you for risks and endeavors you may never had expected.

While I never met Father Michael Joncas, he gave a sermon one Easter morning that I will never forget. He said we spend the first part of life planning what we are going to do with our life and then a second half judging ourselves for not living up to our own expectations. From this message, from that day forward, I chose to live a life directed by freewill.

Over a decade later, my colleague Andy suggested I pursue a doctorate degree, to study the interests I so often talked about. I thought he was crazy. Thank you my dear friend for opening a door to an incredible experience I would had never considered had it not been for you. I also thank Mary H., Joe G. and Dick Z. who hired me into professional positions which required a bit of faith on their part. Your confidence in me, and the opportunities you provided, allowed me to develop and grow into the person I am and will be.

I thank my doctoral cohort who looked and sounded nothing like me the first day we met. What I found was that everyone was actually just like me. We shared a curiosity and passion for learning about people, understanding and developing ourselves and how to help make life most enjoyable. You stood beside me during challenging transitions such as job change, death, relocations and you supported my growth like it was your own.

I thank my dissertation committee for their support and guidance. Dr. Jane Canney, EdD, my cheer captain, who provided kind and timeless support and ideas. You helped me maintain determination and energy as I followed your lead through a life changing accomplishment. Dr.

Alla Heorhiadi, PhD, EdD, thank you for illuminating a remarkable path of learning for me. You awakened my spirit and soul, and shared amazing knowledge about organizations, behaviors and relationships. Most importantly, you taught me how to be and embrace my whole self. There is no greater gift. Dr. John Conbere, EdD, the chairperson of my committee, I thank you for the patience, guidance and support you provided as I opened so many new doors with curious enthusiasm. I appreciate your gift of calm and insightful direction in keeping me on track, and yet enabling me to uncover the fascination of dissertation discovery for the very first time. I learned things from you that no one else could teach.

This project obviously would not have happened without the wonderful support of the University of Minnesota's Center for Spirituality and Healing and the sixteen volunteer participants for the study. I thank Dr. Mary Jo Kreitzer, the director of the Center, for opening up her program to a curious and excited doctoral candidate. I also thank the Center's Beth Sommerville and Cass McLaughlin who created and contacted the list of potential case study candidates from the Purpose Project so I would have people to interview.

I especially thank the sixteen individuals who opened their homes, hearts and lives to a stranger with questions about things deep inside of them, with intent to tell the world all about it. Your courage and thoughtfulness was by far the best part of this research.

Finally to the two most special ones who sacrificed so much while I wrote, reflected, thought, researched and studied. Knowing that this research and doctoral program took significant attention away from our time together, I thank you for waiting me out, and hoping that a break would come soon so we could laugh and play. I started this journey with my Golden Retriever, Ranger, and continued it with my Bernese Mountain Dog, Raygan. You both will

always have a special place in my heart. Thank you for being my partners on this wonderful journey. I would not have had it any other way.

## ABSTRACT

What gets a person out of bed in the morning? Do people look forward to going to work, interacting with others, or spending time on activities and interests they enjoy? What happens when a person retires and the structure of their day completely changes? These questions guided my interpretive multi-case study, which was seeking to understand the experience of people, in or near retirement, who had taken a “purpose in life” identifying workshop. Interviews were conducted with sixteen participants who experienced the one day Purpose Project Workshop administered by the University of Minnesota’s Center for Spirituality and Healing. Study participants attended the workshop between the ages of fifty-five and sixty-eight, an age range when most people enter into, or start thinking about, retiring from their career. Participants were individually interviewed and asked what they had learned about themselves and life as it pertained to living with meaning and purpose in retirement. Each of the sixteen cases revealed interesting insight to the personal journey of retirement planning, and how living a life with purpose changed or was maintained. Analysis across cases revealed five major themes including the process of self-reflection to identify purpose, how purpose factors into different kinds of life transitions, the impact living a life of meaning had on relationships and how organizational involvement interacted with a purpose filled life. With a great deal of literature and research surrounding the value of living a life of meaning and purpose, this study examined the experience of the individual on a very personal level.

## TABLE OF CONTENTS

### CHAPTER 1

Background	1
Statement of the problem	2
Purpose of the study	3
Research Question	3
Significance of the study	3
Definition of key terms	4

### CHAPTER 2 – LITERATURE REVIEW

Overview	6
Relevance of purpose	6
Finding purpose	8
Loss of purpose in retirement transition	9
Re-creating purpose	10
Summary	12

### CHAPTER 3- RESEARCH METHODOLOGY

Research design	14
Participant selection	15
Data collection	17
Data analysis	18
Researcher’s bias	19

### CHAPTER 4- RESEARCH FINDINGS

Interview process	21
Data analysis	22
Individual case analysis	23
Case #1- Jessie	25
Case analysis	29
Labeling purpose	29
Embracing what used to make her sad	29
Loss of caregiving	30
Facing fear	31
Moving forward with purpose	31
Summary	32
Case #2- Richard	33
Case analysis	37
The value of purpose	37



Always doing what he liked	38
Transition in writing	39
Pulling meaning together	40
Summary	40
Case #3- Judy	41
Case analysis	43
Rebuilding self	43
Was writing about grief Judy's purpose?	45
Summary	45
Case #4- Rose	46
Case analysis	48
Major changes in view about her life	48
Facing loss as she aged	50
Unpacking her bags	50
Effects of money	51
Summary	52
Case #5- Lois	52
Case analysis	55
Need to be needed	55
Purpose led transitions	56
Retirement changes priorities	57
Surviving narrow spaces	57
Summary	58
Case #6- Mary	59
Case analysis	61
The retirement struggle	61
What was Mary's purpose?	62
Learning and connecting with self	63
Summary	64
Case #7- Kate	65
Case analysis	67
Quitting work	67
Out of balance	68
Search for new purpose	69
Connecting with self	70
Summary	71
Case #8- Ed	71
Case analysis	74
Two way suspicion street	74
Outward focused	74
Summary	75
Case #9- Jackie	75
Case analysis	78
Taking action	78
Walking away	79
Losing balance	80

Summary	81
Case #10- Dewey	81
Case analysis	84
Heading into the unknown, he started with what he knew	84
Where to look for purpose?	85
Adjusting to an unstructured life	86
Reflecting inward	87
Letting go	88
Summary	88
Case #11- Luda	89
Case analysis	92
Connecting with others	92
Connecting with self	92
Connecting with fulfillment	93
Summary	93
Case #12- Debbie	94
Case analysis	96
Establishing deep relationships with people	96
Purpose with a price	97
Feeling valued	98
Summary	99
Case #13- José	99
Case analysis	102
More purpose than money	102
Courage to step off	103
A new way to view conflict	104
Becoming the Don	104
Summary	105
Case #14- Jay	106
Case analysis	109
Trying to re-create purpose in retirement	109
Wants to be valued by others	111
Taking care of an organization	111
Summary	112
Case #15- Robin	112
Case analysis	115
Watching change and connections happen	115
When to find purpose	116
Connect to people	116
Working through fear and anxiety	116
Summary	117
Case #16- Flo	117
Case analysis	121
Separating self from role	121
Creating a new self	121

Relationships	122
Summary	122
Cross Case Analysis	123
Overview of five themes	124
Outline of themes and subthemes	126
Theme I	126
Theme II	126
Theme III	127
Theme IV	127
Theme V	127
Analysis of themes and subthemes	128
Theme I- People who were able to self-reflect seemed to have had greater success in the identification and practice of living a purpose filled life	128
Being self-aware	129
Learning about self	132
Outwardly focused	134
Theme II- Some people found value in knowing their purpose when they faced transitions in life	136
Naming purpose	136
Purpose may help to accept loss	137
Purpose useful to move on in transitions	138
Theme III- Transitions can involve several components of loss which sometimes need to be addressed separately	139
Retirement losses	139
Caregiving loss	140
Theme IV- The development and dissolution of relationships can be affected by one's recognition and desire to live a purpose filled life	140
Sharing purpose with others	141
Relationships with co-workers	141
Relationship with self	142
Relationship with family members	143
Theme V- Organizations can play an influential role in an individual's pursuit to live a purpose filled life	144
Purpose defined in organizational roles	144
Organizational roles as constraint to purpose	146

## CHAPTER 5 – DISCUSSION

Overview of major themes	148
People who were able to self-reflect seemed to have had greater success in the identification and practice of living a purpose filled life	148

Some people found value in knowing their purpose when they faced transitions in life	151
Transitions can involve components of loss which sometimes need to be addressed separately	153
The development and dissolution of relationships can be affected by one’s recognition and desire to live a purpose led life	155
Organizations can play an influential role in an individual’s pursuit to live a purpose filled life	157
Other insights to the study	158
Limitations	161
Implications to organization development	162
Future research	163
Conclusion	165
Personal reflection	166
<b>REFERENCES</b>	<b>168</b>
<b>APPENDICES</b>	
Participant Interview Guide	Appendix A
Recruitment Letter	Appendix B
IRB Participation Agreement	Appendix C
<b>TABLES</b>	
Table 1- Profiles of Study Participants	24
Table 2- Example Analysis of Cross Case Study	124

## Chapter 1

### Background

Confined to a concentration camp in Auschwitz during the early 1940s, Dr. Viktor Frankl developed the theory that people hold an innate desire to have meaning in their life regardless of the circumstance (Frankl, 2006). Upon his release from confinement, Dr. Frankl authored several books that centered on the premise that without meaning in life, human beings cease to exist and are destined to a certain and near death (Frankl, 2006).

Today, many Americans find meaning in their life through their chosen career, and measure their life's value by the work they do (Leider, 2004). While family and friendships are important, it is the pleasure of accomplishment and exercising of a purpose in life that people find meaningful and essential. This feeling of self-worth and meaning is easily validated in what people do at work (Burgess, 2011).

When building a career and life purpose over time, people fear or ignore the possibility of losing the meaning in their life when they retire from their job. In searching for what activities to participate in during retirement, individuals seldom relate the same characteristics of their meaningful work career to their new phase in life (Sundstrom, Burnham, & Burnham, 2007). While retirement is advertised as "The Golden Years," many retirees find this period to be boring, meaningless and unfulfilling (Burgess, 2011).

As a result, many organizations created or broadened their offerings to individuals looking to re-design or continue the meaning and value they identified with during their working years. One organization very familiar with the lifestyles of retired people is AARP, American Association of Retired Persons. This group launched a website in 2012 named "Life Reimagined." This interactive website is a tool designed to assist retirees in the reflection on

their life's purpose and what activities in retirement may re-create or connect the meaning they experienced during their working years (AARP, 2012).

Similarly, the University of Minnesota established a "Purpose Project Workshop" designed for those who are actively looking for purpose in work, life and healing. At the University's Center for Spirituality and Healing a person may participate in a one day reflection on what gives their life meaning and purpose with a series of designed exercises and tools (Regents of the University of Minnesota, 2013).

In 2009, I attended the Purpose Project Workshop and recognized the preponderance of fellow participants had retired in recent years. Conversing with them revealed that although they did not miss the stress of work life, many desperately felt drifting through the days and months without direction, purpose or personal fulfillment. Many had come to The Purpose Project Workshop to connect with their life's meaning.

In the years 2003 to 2010, my career as a financial service professional allowed me the opportunity to meet with thousands of people planning for their retirement phase. While income planning was the reason for our personal meeting or my seminar presentation, I learned a great deal about the concerns people had about retirement and what activities would help them fill their days. Many looked forward to pursuing hobbies, leisure activities, spending time with family, travel and continuing some sort of work life. However, those that had retired for some time regularly complained of not feeling the same value in society as when they were working full time. When I pressed them, many retirees confirmed that they wished their life had more personal meaning with purposeful activities.

### **Statement of the Problem**

Although people may be looking for ways to create meaning in their retirement years, and organizations are developing tools for them to do so, there is little research on the outcome and experience of those who participate in programs designed to help them find purpose in their life. A better understanding of the experience of people who search for meaning during this phase of life was needed.

### **Purpose**

The purpose of this study was to gain a deep understanding of what people learn when they search for purpose in life as they approach or pass through a transition into retirement.

### **Research Question**

What do people in or near retirement age, who have participated in a purpose defining program, learn about life and themselves?

### **Significance of the Study**

There are many books, websites and journal articles that profess the necessity and value of people engaging in meaningful activities during their retirement years. However, there was very little research on the effectiveness or experience of people who actively sought out these types of programs. Most of the research identified and compared groups of people who led a self-proclaimed purpose driven life to those who do not.

This study may help organizations learn about the needs and experience of individuals who voluntarily sought an exercise to reflect on what brings joy, value, purpose and meaning to their lives. While the reasons for people to engage in such exercises may differ, the study uncovered valuable information to understand how people felt during the process, and what outcomes had come about as a result of their participation.

I anticipate the results to be useful for organizations that develop and provide tools and exercises to people who visit such workshops, seminars or websites. Additionally, this study may be used by organizations who wish to create effective, similar exercises for their retiring employees, or their customers who may find value in such services.

Of particular interest is the potential value to firms engaged in the financial services industry. Because this group is generally focused on financial planning for retirement, they hold tremendous access to couples and individuals who are leaving the work force and headed into the final phase of life. Armed with information on what some retirees have found as useful tools or exercises to find meaning in their life, financial planners could provide guidance and direction towards these programs as a value added offering to their current and prospective clients. In working with one financial firm that provided seminars to help clients uncover a purpose-filled retirement, Schoonmaker (2007) discovered that virtually no other investment firms offered such services.

### **Definition of Key Terms**

For this study there are several key terms that warrant further definition and clarification.

**Purpose.** A self-declared recognition of what provides fulfillment in life. The way people live life that gives them joy and makes them feel like they have a reason to live.

**Meaning.** To live a life with meaning is to have a feeling of enrichment and purpose in one's activities, thoughts, and interactions. A feeling that one's life is significant.

**Retirement.** A period of time experienced when people no longer work in a career. The most common use is when people quit their last meaningful job and spend the majority of their day in activities that are not income producing.

**Career.** A person's lifework.



**Self-actualization.** Process of understanding one's self including an awareness of abilities, potential, and shortfalls. A person with self-actualization skills can understand what provides them fulfillment and meaning but also despair.

**Self-aware.** The ability to become conscious of one's own bodily and mental states including perceptions, attitudes, opinions, feelings and interactions with others (Geangu, 2008).

**Semi-retired.** A period of life people name themselves when they are still working in a job or lifelong career but spend far fewer hours in a week doing so.

**Workshop.** An organized class designed to take participants through hands on activities to experience or learn about something.

## **Chapter 2**

### **Literature Review**

#### **Overview**

There exists an abundance of literature reporting the value and necessity of living a life with purpose. While researchers and authors commonly agreed on what purpose and meaning in life truly represents, and the importance of knowing purpose, there are multiple suggestions of sources and methods in which to find one's purpose. An extraordinary amount of literature agreed on how most people find and relate their individual purpose to their professional work, only to feel disconnected from purpose when they retire from that career. Relevant to people retiring in recent years, one author suggested the transition to retirement should be renamed "renaissance," as many people find their true calling in life when they no longer spend most of their time chasing a paycheck (Lavelle, 2006). During retirement or renaissance, retirees have the benefit of more time and resources to be more purposeful in their activities. While the ways to find one's purpose are outlined in some sources, many articles simply claim that it is important to know what activities provide a meaningful life, with no suggestions on how to pursue it. Finally, while Leider (2004) provided a few examples of the experience of friends, family members and clients who found purpose in their life from his research, there remains a significant gap in literature as to how people feel about and respond to the process of finding meaning in their life. Gaps also exist in studies to learn what type of outcomes were experienced when people have undertaken such a purpose driven search.

#### **Relevance of Purpose**

Living a life with purpose is deemed valuable in all relevant literature. But what is purpose and why is it important? Many authors described the deep emotional fulfillment

individuals feel when their behaviors are aligned with activities that provide the greatest joy in life. Leider (2004) described purpose as an alignment of an individual's unique gifts, passions and values into meaningful activities. He further explained that purpose is unique for every person and it can only be exercised through action. Simply stated, life purpose is more of a practice than a concept. Sundstrom, Burnham, and Burnham (2007) described the necessity of personal fulfillment by engaging in activities that are both personally satisfying and have importance. People want to matter in the world, and they can design, create and implement a template for themselves that measures whether their behavior and actions are personally fulfilling. When people execute activity that they feel is important, it creates joy and value to their lives.

Schlossberg (2009) studied the value of searching for happiness during life transitions. She found through personal interview and observation there is a universal need for individuals to feel like other people need them, as well as holding an individual sense of purpose for your life. Written for workshops and support groups, Schlossberg's book "*Revitalizing Retirement: Reshaping your Identity, Relationships, and Purpose*" focused on the necessity of guiding people through their retirement transition by examining relationships, identity, and sense of purpose in life.

In an interview with Dr. Patricia Boyle, researcher for the Rush Memory and Aging Project, Cole (2013) wrote that people live a more active and healthier life when they pursue goals and feel like their life has purpose. Dr. Boyle also described how motivated people feel when they have goals which make them feel like their life has meaning (Cole, 2013). When people feel like they have a reason to get out of bed in the morning, Leider (2004) found that

their life has direction, energy, and a profound sense of who they are and why they exist in the first place.

### **Finding Purpose**

While purposeful behaviors can assist in leading a healthy and enjoyable life, authors differ on how to find purpose. The book by Warren (2012) titled "*The Purpose Driven Life*" is a spiritually guided template for uncovering God's reason to put each person on earth. With over 32 million copies sold and on the New York Best Seller's list for many years, Warren's book is translated in over 50 languages, second only to the Bible. Warren declared that regardless of one's age and stage in life, a journey into finding personal purpose in life begins with God, and why He (or She) decided to create each person. The process involves reading a chapter a day, for 40 days to uncover one's meaning and purpose in life.

Also a best seller, but not as widely distributed, was Leider's (2004) "*The Power of Purpose: Creating meaning in your life and work.*" Leider's message was not about finding purpose and meaning through a spiritual journey but rather a personal reflection on gifts, talents and what brought joy to one's life. His process, however, involved looking inside of oneself first. Leider designed a series of exercises to help people name a calling, a purpose, as well as a list of activities they might like to pursue to exercise their purpose.

During their formative years, young adults are often told to "do the work they love" so many find a career in a field or role they are passionate about. People build purpose in life by navigating away from activities that are not as meaningful and gravitate to those that bring them joy and fulfillment. Doing a job can bring the satisfaction of goal attainment, mastery of tasks, and a sense of accomplishment in a job well done (Sundstrom, Burnham, & Burnham, 2007). Professional lives also allow people to build relationships, work in teams, and socialize with

people that share a common something with each other. Companies with a philanthropic culture may organize its workers for a fund raiser or event to sponsor a charity or community project. In so many different ways, employment provides a source of fulfillment outside of just performing a skill or task that may be in itself very satisfying. In many cases individuals become so involved in their work, that it even defines who they are as a person (Burgess, 2011).

### **Loss of Purpose in Retirement Transition**

The transition from work life to retirement may bring a tremendous sense of loss when people retire from their career. Although retirees are supposed to be entering a period of life that is relaxing, stress free, and allows for more time to pursue travel and hobbies, retirement can end up becoming an extremely depressing event for many. Sundstrom, Burnham, and Burnham (2007) described a successful retirement transition with a four stage model of relinquish, recess, redefine and re-engage. These phases are very similar to Bridges' (2009) three stage model of transition with letting go, neutral zone, and new beginnings.

Sundstrom, Burnham, and Burnham (2007) stated that to successfully navigate the transition to retirement people must first "relinquish" the value placed on past activities they found so fulfilling in their work. In retirement, people can find it difficult to recognize and accept the depth of emotion they feel when they no longer have power, influence, or satisfaction of a project that has gone well. Bridges' (2009) model, likewise, used "letting go" of what was, as the first step in moving forward.

Like Bridges' (2009) "neutral zone," research conducted by Sundstrom et al. (2007) called for a "recess" to pause, rest and reflect on the transition to take the time necessary to generate the energy to move into the next phases. This period can be short for some individuals while others spend a long time in neutral zone or recess.

The final two stages, according to Sundstrom et al. (2007), are to “redefine” and “re-engage.” Like Bridge’s (2009) “new beginnings” stage, this time is needed to identify the enjoyable parts of your life and plan the steps to put these new habits into action. These two models both expressed the necessity of going through each phase, with whatever time is needed, to successfully navigate a transition. While Bridge’s model is applicable for any transition, Sundstrom’s was designed specifically for the retiree.

While McVittie and Goodall (2012) also wrote that retirement is a major transition in life, they added that the very name of “retirement” itself commences a personal let down. Although actual retirement is hard to define, it does suggest a period of what people are no longer doing rather than what new activities people create for themselves. Seaberg (2009) concurred that people must be able to replace the meaningful activities and relationships a person builds at work, or the transition will ruin their purpose and even their whole identity.

### **Re-creating Purpose**

So what types of activities can people participate in to maintain purpose and meaning in their lives when they reach retirement? Many authors believe that retirement is actually the best time for people to really pursue their dreams. Three things that retirement brings to people are time, financial independence and life experiences that provide a resource to what activities provide passion in life (Anonymous, 2007). While a work career allows for a framework for meaningful activities, true freedom from professional responsibility and stress can represent a time for people to truly pursue a purpose that helps them grow whole.

Literature supported the value of volunteering and supporting charitable causes as a way to re-engage with a purposeful life in retirement. Giving of one’s time towards a meaningful cause is normally done to make the giver feel good about helping others. Many retirees found

that meaningful work can be found in volunteering (Lavelle, 2006). Using professional experiences to teach, write, edit and tutor in your own profession was another way to find meaning after a retirement transition (Kim, 2011). With this strategy, people can find comfort in staying engaged in the industry they know well, without the stress or responsibility of a paid position. Additionally, this strategy could allow retirees to blend the nuances of their known industry with a curiosity of an un-pursued path such as mentoring, or assisting a startup business in that same industry (Kim, 2011).

Staying active and serving others is also supported in the work of Dr. Harold Koenig's book *New Opportunities for Meaning and Significance* (Gold, Rotella, Andriani, Scharf, & Zaleski, 2002). Dr. Koenig compared the drive to create income in the working years with an equally fulfilling drive for activities that benefit others in retirement years. Like Rick Warren's writing exemplified in *The Purpose Driven Life*, Koenig also suggested that pursuing a higher purpose in spirituality will create a more fulfilled life, and this calling may be answered through volunteering and serving others (Gold et al., 2002).

Much research has been reported on the value of connecting past work experiences to similar job related activities in retirement. Zhan, Wang, Liu, and Shultz (2009) studied the physical and mental health of retired individuals. They found that people who continued to work in some capacity in retirement had fewer major diseases and functional limitations, and a better mental health state than retirees that did not maintain some level of employment in their retired years. Muratore and Earl (2010) similarly found that staying engaged in work of some kind during retirement years contributed to happiness. They stated that work provided the social contact and continuation of active thought to create enjoyable years during retirement.

A phenomenological study of Australian retirees was performed by Pepin and Deutscher (2011) which revealed that maintaining identity from an individual's previous occupation was important during the transition to retirement. They also found that spending time with grandchildren, and activities related to physical and mental health were important to people during their retirement years. While learning about activities important to retirees, this study did not address specifically the journey of maintaining purpose or meaning for those transitioning into retirement.

With so much support for the notion of losing one's identity and life meaning when retiring from work, where can people go to find their purpose? As referenced earlier, books such as *My Next Phase*, *The Power of Purpose*, and *A Purpose Driven Life* can provide different exercises and measures to search for activities that are personally rewarding. Also referenced earlier, retirees can utilize websites provided by organizations such as AARP, or workshops such as "The Purpose Project" to conduct self-directed exercises to uncover their purpose (AARP, 2012; Regents of the University of Minnesota, 2013).

While much of the literature referenced here advised to the value and even necessity of living a life with purpose in retirement or during any part of life, I could find no evidence of the experience an individual encounters while on this purpose journey. Although Leider (2004) provided a small sample of outcomes, most other literature simply stated that purpose is good to have and compared those who find it with those who do not.

## **Summary**

While the value of having a purpose in life is never changing, the stages and transitions in life require someone to reflect, re-evaluate and either engage with a new purpose, or find new activities that fulfill your current life's meaning. Some authors suggested that connecting with a



higher power is the ultimate purpose, while others proposed that a deep inward reflection combined with actionable steps will help someone through a purpose transition. Retirement seemed to be a very significant transition for people as it relates to life's purpose. However, many authors suggested that retirement could be the best opportunity to connect with a current or new meaning in life. The big question is how to do this. Exercises, workshops, books and theories all outlined processes to try, but very little examination of the effectiveness or experience of this process exists. I wanted to fill that gap with this study.

## **Chapter 3**

### **Research Methodology**

To have a better understanding what retirees learn about themselves and life while on a journey to define purpose and meaning, I employed a multi-case study methodology based on interpretive epistemology. My years of experience in talking to people preparing for, or currently in retirement, led me to believe that each person had an individual story to tell. Each person on a journey for purpose is an experiment of one (Leider, 2004), and every case has its own levels of complexities (Stake, 1995). To present an individual the opportunity to tell their story is best conducted in a case study design (Stake, 1995). By utilizing a case study of individuals, the components of one person's story may be uncovered with unencumbered depth. Multiple individual case studies were performed for the research with intent to seek commonalities or differences between each individual's stories (Stake, 1995).

### **Research Design**

The study was conducted through personal interview with individuals between the ages of fifty-five to sixty-eight. My experience is that this age range isolated individuals in the most common time period for beginning or contemplating their retirement. The individuals interviewed had participated in a common purpose seeking workshop as described later in this proposal. I had eight planned questions for each interview, outlined in Appendix A, with appropriate follow-up probing questions to understand the emotion and feeling the participants held regarding their situation.

The goal of the research was to learn the deep feelings, emotions and reactions of someone transitioning into the retirement phase of life, while maintaining or re-creating purpose and meaning for themselves. Therefore, each case consisted of a single participant as only that

single individual could reflect and express what their own true feelings and understandings mean to them.

The questions for the participants were piloted through informal interviews with three individuals who used purpose searching exercises in the past. My intent in testing the questions was to ensure the questions were clear, meaningful and had the potential for rich data collection. In the pilot program, I asked the interviewees if there were questions or areas of which I did not ask or probe to get a better sense of what I may expect to learn during the research process. The three individuals made no recommendations that other questions be added.

It is important to note that while each of the study participants had attended a similar purpose seeking workshop, as explained below, this study was not an evaluation of a specific workshop or exercise. The individual multi-case method was used to learn about the outcomes and realizations people had about life and themselves as they passed through the transition into retirement.

### **Participant Selection**

This interpretive multi-case study was designed for ten to twenty participants ranging in age from fifty-five to sixty-eight. The number of participants was selected to allow for completion of the research when I determined that sufficient data had been recorded, while allowing the flexibility to explore more individual cases if the data remained unique and of interest. The age range was selected to secure participants who are typically nearing retirement or were newly retired.

I interviewed sixteen individuals. I found the data to be rich and informative but ended the data collection after sixteen interviews as the answers and stories seemed to reach saturation. I also felt I had enough data in which to report.

While the definition of retirement was described earlier as a transition of someone moving away from a defined work career, I also considered individuals whose careers involved stay at home parenting, homemaker, or part time work. My experience led me to realize that moving from raising children and running a household into retirement is also a relevant and considerable transition as it related to re-creating a life's purpose.

Some individuals within this age range, who participated in the Purpose Project workshop, were still working and not yet retired or planning for retirement in the near term. I still used these volunteers to participate in the study. My experience has been that most people are contemplating retirement during the ages of fifty-five to sixty-eight. However, if an individual in this age range had chosen to continue to work, even part time, I included them in the study. My sense was that people who choose to continue in their careers will still have a story to tell as it related to having purpose and meaning in their life while delaying retirement.

I contacted Dr. Mary Jo Kreitzer who is the founder and director for the aforementioned Center for Spirituality and Healing at the University of Minnesota. In support of this research, her department agreed to contact past participants of the Purpose Project workshops conducted over the last ten years. Together with the Center for Spirituality and Healing, we composed a letter, illustrated in Appendix B, to seek volunteers to participate in my research. The respondents contacted me directly. With this process, the Center did not breach any confidentiality of past participants by providing names or contact information to me prior to the individual volunteering for the study. (See Appendix C)

## **Data Collection**

The first stage of data collection was to understand the components of the program and process in which the interviewees participated. While the case study research was not an evaluation or deep description of the Purpose Project workshop, it was important to note the background of the program in case a participant referenced a specific exercise or component of the workshop. Having a broad understanding of the program allowed me the ability to dig deeper into the participant's experience and more importantly what they learned from it. To refresh my memory of the Purpose Project workshop, I reviewed notes from my participation in 2009. I also reviewed information from their course materials, website, and any information the workshop coordinators discussed during the program. I consulted with the Outreach Coordinator at the Center, who confirmed that the materials I referred to from 2009 were current and appropriate for current and past workshops.

The second stage of data collection was conducted through personal interview of the Purpose Project participants. I conducted interviews, sixty minutes in length, in a comfortable and convenient place for the participant, whether that was in their home or a quiet setting of their choosing. Care was taken to ensure the interviewee understood the length of time needed for the interview. Distractions and interruptions were kept to a minimum. Each personal interview was recorded and I took written notes during the interview. My notes mainly involved memoing as I wanted to focus on the participant's emotion and gesturing in addition to their story. My intent in note taking was to capture the major ideas during the interview but also to record the emotion, feeling and sense of the depth of what was being told to me by the participant. Note taking also involved recording direct quotes, key words, hand and facial gestures, physical posturing and any other observations I deemed to be relevant to the data collection.

To ensure the data I recorded was accurate, I employed member checking by frequently repeating what I was hearing, back to the interviewee. Most of the time the interviewee confirmed the words and context of their answers, but on a few occasions the interviewee restated or broadened their answer to provide greater clarity for me.

Participants are not named in the study. Care was taken to protect the identity of the individuals and the information they provided. I used pseudonyms for the participants and assigned random numbers to the notes and recordings to prevent any retracing to the original identity of the interviewee. I kept a key aligning the participant's actual names, assigned number and pseudonyms locked in a safe in my office, away from all other data and recordings. When I received emails from potential participants I printed the information, kept it in a secure file, and deleted the email. Dr. Kreitzer and I discussed the option of having the Center for Spirituality and Healing named in the study or keeping its identity anonymous. She advised me that she did indeed want the Center to be named in the study.

### **Data Analysis**

As this interpretive case study methodology involved a number of singular, individual cases, I performed the initial data analysis in conjunction with the data collection process of other cases. For the data analysis, I highlighted the major points for each study to re-tell the story of the participant in a clear and organized manner. Care was taken to uncover, recognize and highlight the emotion and feeling expressed by the participants to weave into their story. I did this by aligning the emotion expressed and demonstrated by the participant with the part of the story they were telling during the interview. As each case was unique and complex I analyzed the data to understand the depth and importance of the interviewee's experience, and to relate the experience to activities and behaviors that took place after their purpose identifying exercises

concluded. To do this analysis, I read and listened to the recorded interviews three times and reflected on the major components of each story. Using the data I collected through observation of the participant during the interview, I made notes in the margin of the interview transcription to match the spoken words with the emotions expressed by the participant.

Upon completion of all interviews and initial data analysis, I studied the data to determine cross-case commonalities. While generalizations of data to a general population are not relevant in a case study design (Stake, 1995), the number of interviews revealed similarities or contrasting differences in emotional levels of experiences of the participants. To determine this, I organized the data obtained from the interviewees in both emotional and physical categories using the highlighted information from the individual analysis. I pulled the blocks of data with similar colored highlights and aligned similar experiences for comparison on an excel spreadsheet (See Table 2). I then examined the significance of these comparisons and why they may be relevant to organizations that provide purpose-seeking exercises to people in transition to retirement.

### **Researcher Bias**

I held a number of biases which I will explain here. First, while I am not a person going into a retirement transition, I had attended a number of purpose-seeking workshops and exercises. While many retirees attend the purpose workshop, they are designed to serve anyone regardless of age or stage in life. I attended author Richard Leider's purpose-seeking workshops in November 2002 and in October of 2012. I also attended the Center for Spirituality and Healing's "Living with Purpose" workshop in September 2009. It is important to note that the Center for Spirituality's workshops are based on the work of Richard Leider, who is listed as a Senior Fellow at the Center. Therefore, I basically attended the same workshop on three

different occasions, in three different locations. Again, while I did not attend to re-create a life purpose in retirement, I found considerable personal value in the exercises and experience. Each time I participated, it was life changing and meaningful.

While I would define my experience in these workshops as extraordinary, some fellow workshop attendees found the experience to be uneventful and unrevealing for themselves. Others commented that while the exercises were fun and useful, they did not have a significant impact on a realignment of life purpose. Because I had such a personally rewarding experience in the workshop, I needed to be aware that the questions I was asking were not leading the interviewee into speaking about their experience in only a positive light. I was also conscious not to judge the reasons why the interview participant did not have a similar experience.

The various reactions to the workshop are relevant because they demonstrate the complexity and uniqueness to many different experiences in a similar purpose seeking exercise. My personally described exceptional experience may or may not be similarly expressed by participants in this study. Care was taken to be transparent about my personal experience with the Purpose Project when interviewing the participants. I was diligent and cognizant of this fact when undertaking this study. I also asked the pilot interview participants if my bias affected their answers during my interview with them. They said it did not.



## **Chapter Four**

### **Research Findings**

My interest in learning about how people view and learn about purpose in their lives started when I participated in the Purpose Project in 2002. At that workshop, I learned that I enjoyed “facilitating change” in people, my job, organizations, and processes. This purpose was what got me out of bed in the morning. Labeling purpose helped me make sense of the decisions I made in the past, and provided a framework for what type of work and activities I might enjoy in the future. Ultimately learning about this purpose in my life led me to pursue this doctorate degree in organization development.

My purpose led journey also made me curious of the experiences of others in seeking meaning and purpose in their lives. With my work in financial planning for pre-retirees, I developed a respect for those people transitioning from decades of work into a new phase in life. Often people entered retirement without a known direction but curiosity of what it will be like to own their time. I found this study to be an interesting insight into the various plans, processes and experiences of those entering and experiencing retirement.

#### **Interview Process**

I conducted sixteen hour-long interviews with individuals who had participated in the Purpose Project Workshop. I met the interviewees at their home, a nearby coffee shop, or a quiet conference room at their place of business. The interviews were audio recorded with the approval of the participant. All of the interviews took place in the greater Twin Cities metro area in November 2013.

Many of the participants had upfront questions about what I hoped to accomplish from this study and how I became interested in people from the Purpose Project. Some expressed

concern that they did not have a very good story to tell, as they did not remember much about the activity at the Purpose Project. In those instances, and for all participants for that matter, I assured them that while participating in the Purpose Project qualified them for the study, I was interested in their personal journey of experiences as they moved into retirement. Therefore, I did not plan on asking specific questions about the activities of the workshop, unless the interviewee referred to them first.

### **Data Analysis**

The data collected was secured and analyzed after the completion of all the interviews. I listened to the audio recording of each interview and took simple notes to review the essence of the story being told by the participant. I listened to each interview a second time and outlined the interviewee's answers to each question which I matched with the notes I took during the interview. I looked for consistency and discrepancy among words, tone, and voice inflection with the physical observations I made and noted during the interview. I then had the audio interviews professionally transcribed. With the word for word transcription, I highlighted quotes in various colors that aligned with the outline I created for the interview. The colors represented meaning and messages that were expressed at different times during the interview that seemed to correlate with each other and the outline topics. For example, if using life purpose during a transition was an outline topic, I highlighted all the quotes and references from the transcript in the same color. Finally, I constructed a final outline of the individual interview including three, four or five high points that emerged. The high points were descriptions of the essence of the participant's journey in searching, finding, expressing and experiencing meaning and purpose in their life during their transition into retirement.

After writing the details of each individual case I performed a cross case analysis. Using a series of Microsoft Excel spreadsheets, I listed common categories among individual cases across the top of the sheet with the sixteen individual's names along the left margin (see Table 2). There were eighteen categories. I inputted a summarized notation of each individual's response to the corresponding category.

From the spreadsheets, I consolidated the categories and responses into four major themes. The themes included how purpose in life related to self-reflection, transitions of all kinds, relationships, and organization. I created supporting subthemes for each of the major themes. There were three to six subthemes for each category. On further analysis, I elected to split the findings of purpose during transition into an additional theme. This additional theme included an analysis of how a single life event can involve several interrelated transitions and grief periods. Therefore, I ended with five major themes, with two to four supporting subthemes for each.

An interpretive multi-case study is designed for each individual case to stand on its own merit, in addition to a cross case analysis (Stake, 1995). Therefore, the results of the data analysis are comprised of two parts. The first part is the individual case studies themselves, sixteen in total. Each case is described below with an overview including direct quotes from the interviewee, my observations, and followed by three to five high points stemming from the case. The second part reveals the results of the five cross case themes, corresponding sub-themes and supporting data for each.

### **Individual Case Analysis**

For each of the sixteen individual cases, I provide a brief overview of the interviewee followed by a synopsis of their answers from the interview. The synopsis is generally organized

in a story type format with many direct quotes from the interviewee. Following the synopsis is my case analysis broken into high points I found relevant from the interview. Finally, I provide a brief summary of the individual case. Listed below is an overview of the sixteen individual case studies.

Table 1

*Profiles of Study Participants*

<b><u>Pseudonym</u></b>	<b><u>Career</u></b>	<b><u>Title of Case Study</u></b>
Jessie	Public affairs	Go fill the bird feeder
Richard	Marketing writer	Don't commit to stupid stuff
Judy	Business manager	We had cancer
Rose	Corporate attorney	I wish I had quit long before
Lois	Registered nurse	I think I would die if I didn't have purpose
Mary	Education administrator	I failed YOUR definition of retirement
Kate	Alternative educator	Tell me I'm wonderful
Ed	Teacher and coach	When and who should help me find this purpose?
Jackie	Psychologist	I don't need to be a psychologist to impact change
Dewey	Military commander	A clean finish
Luda	Public health administrator	I don't know where I belong
Debbie	Public assistance coordinator	Will you hold my faith for me?
José	Professor	I'm not a Don...yet
Jay	Human resources	I still haven't found what I am looking for
Robin	Professional fundraiser	A REAL horse
Flo	Community education	I wanted to shout my purpose from the rooftops

**Case #1- Jessie, “Go fill the bird feeder”**

Jessie was a very well spoken, well-educated woman who lived on a ranch southeast of St Paul, Minnesota. She took the purpose project in 2006, shortly after her mother died. Jessie held advanced degrees and worked in public affairs until 2004. Jessie, who was in her early 60’s, was married with adult children. She came to the interview with her therapy dog, Biscuit (pseudonym). Jessie and Biscuit traveled everywhere together as she enjoyed watching people pet the dog and tell her their story or problems.

Shortly after her mother’s diagnosis of breast cancer, Jessie received a message that profoundly defined and changed the way she viewed life. While Jessie and her family were planning who would do the cancer treatment research and who would care for Mom during her fight of this awful disease, Jessie’s mother went fishing for the weekend. When her mother returned, her message to the family was very clear.

My Mom said to us, “I’m not dying today and I’m not going to waste this day I have. And if you waste this day crying then shame on you.” Then she looked right at me and said, “Why don’t you go do something for someone else. Go fill the bird feeder.” And so I did...Somehow filling the bird feeder, life turned a corner for me somehow...I realized Mom is actually doing OK right now, so what’s my problem?

Filling the bird feeder was a clear metaphor for how Jessie lived her life, doing something for someone else. Jessie’s professional life was purposely designed to be in a support role, or as she called it, “Being a number two.” Jessie was not the one that made the speeches; she was the one who helped the speaker write them. Jessie did not appear on camera, she prepared the person that was terrified to be interviewed on television. Jessie’s role in her professional life had always been about “being a coach, a mentor, a muse.” She joked that if she wrote a job description for her roles the most fitting requirement would be “other duties as assigned.” Jessie

believed that it was doing the “whatever it takes” to help someone else step up into a role or position that gave her life meaning and purpose.

Jessie’s purpose was very clouded when she took the Purpose Project workshop shortly after her mother died in 2005. Eighteen years after the cancer diagnosis and the fateful “bird feeder” comment, Jessie’s mom died in hospice care. Jessie was lost. She explained, “I found myself utterly unemployed for the first time in my life. I didn’t have a job. Even as a caregiver. (Mom) had fired me, by dying.” By this time, Jessie’s children had grown and moved away, she had already left her career in public affairs, completed her graduate degree, and since had focused her time and attention on caring for her mom. Jessie realized she now had nothing to do.

When a friend suggested taking the Purpose Project workshop, Jessie relented. However, her friend needed some guidance in her own life so Jessie agreed to go. “I’m a little vulnerable to people saying, ‘can you help me?’”, Jessie said. However, on the day of the workshop, her friend decided not to attend leaving Jessie with a decision of going alone or forfeiting her pre-paid workshop fee and returning home. She wanted to go home, as she was tired and still grieving, but went to the workshop anyway.

I walked in the room that day, and realized I am among the younger ones there. So I felt I didn’t belong here. I was fifteen years the junior to everyone there. I didn’t even really know where to sit...I felt adrift. I felt like there are times when you walk in a room and you are in full bloom in your life. And at that time I felt like I was all leaves and no blooms.

Although she felt awkward, Jessie made the most of the day. She did not know how to describe herself during the introductions, but faked her way through it.

At the time of introductions I booted it...All I could do is define myself as what I used to do. That was a bummer. What I remember is that I said I was fresh off saying goodbye to my mother...I really didn’t want to talk about it...I said I was an at home based consultant...but even that felt awkward because although I still had clients... that (label) didn’t really fit....This world will value someone that at least appears to have a plan...Right now I had neither strategy or plan.

Turned out, the Purpose Project workshop was the source of Jessie's second life revelation. During the Purpose Project exercise that involved a process of sorting and prioritizing a deck of "calling cards" into different piles, Jessie selected the five cards she felt best described herself. However, when Jessie shared her cards with a member at her table, per the instructor's direction, her partner dismissed one of Jessie's five self-selected cards. Jessie's calling card partner, a complete stranger, attacked the discarded deck and selected a card for Jessie that she felt more accurately described her. The card read "Awakening Spirit."

After the Purpose Project Jessie wanted nothing to do with the Awakening Spirit card so she tossed all the cards into the back seat of her car where they laid for many months. As Jessie continued to work through the grief of her mother's death, she resurrected the calling cards and asked others to look at the cards with her. She claimed that everyone selected the Awakening Spirit card for her...her husband, her son, her daughter, her close friends. When asked why she wanted to reject that card, which supposedly defined her purpose in life, she had no good answer. But ultimately Jessie not only accepted the label, she embraced it.

That card described ALL of my work. ALL of my work...When I look back I think of what a glorious thing to spend a day at a purpose project while in limbo. What a gift...That day gave me some permission to be on a walk in the wilderness without all my luggage. (I realized) I can tune into people around me, and realize how wise they are doing things they are called to do. I was way out in the dark away from the fire. And I thought I don't know how to earn my way back into the middle of this wisdom seeking.

Ironically, as an example of her awakening spirit label, Jessie told another story about her calling card partner that day. Before this stranger selected the Awakening Spirit card for her, Jessie helped this stranger select and diagnose her own cards. When the stranger had revealed her own five descriptive cards to her, Jessie slapped her hand over them and confronted her activity partner to re-think the cards. Jessie "just knew" those cards did not describe this woman. The woman cried, revealed that the cards selected were reflective of who she wanted to be to her son,

who was having some problems, and vowed to select new cards that were true to herself. The stranger returned confidently to the table with five new cards that Jessie agreed were much more aligned to the stranger's purpose and interests. Jessie's instinct and ability to awaken the spirit of others was finally defined. She confided that there was a risk to confronting this stranger, an activity partner who she would never see again, but in the short time they spoke the cards just did not seem to describe this woman accurately. However, Jessie claimed she felt a responsibility to take a chance and be the one to suggest a new lens for this woman to view her life.

This is exactly the cocoon I would get into with people (in my work)... people would tell me exactly what was really going on with them...a lot of my job was to reflect back to them the wisdom they were giving....you know they had the answer...sometimes I think people just need a validation back.

I asked Jessie if she felt she was the match that ignited the fireworks of others. She replied, "No, I hold the match for another to take and light their own fuse. Once that is done, they leave me, as my work (with them at the time) is done." Jessie described how she used to feel lonely when a job assignment was completed or someone left her life after she helped light their fuse. Now she reveled in people moving on with their life. With a clear definition about what her purpose in life was, Jessie learned to anxiously await the next opportunity to hand someone a match. Jessie now celebrated the success of others, so long as she can remain in the background.

Jessie's story articulated the value of someone discovering their purpose in life through the Purpose Project and other reflection. This revelation served not only a validation for roles and activities from the past for Jessie, but a guiding beacon for the future. Jessie exuded confidence that when one person left her life, the next project appeared. She now understood her meaning in life, "First and foremost I had to awaken my own spirit. That purpose day was a first step in the direction of awakening my own spirit."



**Case analysis.**

*Labeling purpose.* Learning her purpose was a lengthy journey for Jessie which she rejected for quite some time. When the “Awakening Spirit” title was suggested at the Purpose Project, Jessie threw the calling cards into her back seat for several months and wanted nothing to do with them. Once the awakening spirit card was supported by so many other loved ones in her life, Jessie embraced the label. It took time for the exercise to take effect on Jessie. Eventually, the calling card result was so meaningful to Jessie, she handed out decks of cards to others so they might find value in the same exercise.

When the Purpose Project provided her meaning in life a label, Jessie said she started to make sense of why she did the things she did. Jessie claimed to live her life by seeing something of value in people and reflecting that value back to them. She said naming her past actions gave her satisfaction, validation and a clearer path for the future.

Jessie seemed to have always known what gave her life meaning, just without being able to articulate it with a name. While Jessie accepted her labeled purpose to be an “awakening spirit” she actually described her meaning in life throughout her story in other ways. Before the Purpose Project, Jessie learned to “fill the birdfeeder” which was about doing something for someone else. This metaphor also described her purpose well, as she was the source of advice for others who came to her “birdfeeder.” After the Purpose Project, and giving this new label some thought, Jessie felt she could describe her purpose as handing matches to someone to light their own metaphorical fuse. She said that metaphor helped her explain and understand the meaning of the term Awakening Spirit.

*Embracing what used to make her sad.* Jessie used to feel lonely and abandoned when she helped someone past their challenges only to have them move on with their life, leaving her

in the dust. She knew that this abandonment was nothing personal, as it was just a part of the business she was in, but it still hurt Jessie, and she felt great sadness. Once she defined her purpose, Jessie chose to celebrate when people moved on with their life after she helped them.

Jessie explained that her method of helping people was really just reflecting back to them what she heard. For example, Jessie helped a prominent politician make his first speech after his election. She did not write the speech for him, rather she just wrote down everything that he said to her in a manner that was easy to follow. The speech was a moving success and started a courageous political journey for this elected official.

Jessie's acknowledgement of her purpose provided great joy when it allowed her to make sense of her past emotions. She no longer felt bad about the lonely feelings or sense of abandonment. The embracing of purpose for Jessie also provided vision for her future journey. She explained that being asked to "spice up" a sleepy annual fund raising event gave her the chance to infuse life and character into the event, along with the ability to let it go after one year as the chair. Jessie saw her involvement as a way to show people how to make it fun, but then to step back and let others take over for future years with a fresh vision. Her sense of purpose allowed herself to only be involved for one year and then hand the match to someone else to carry the event forward.

***Loss of Caregiving.*** Jessie felt empty after her mother died. She felt a different level of sorrow and loss and for the first time did not feel she had "a next," or something to work on. Jessie's grief left her shocked and frozen in time. She spent years caring for her ailing mother, had no plan for herself after the caregiving period, and no mother to fall back on for advice this time. Although her mother's living examples of dealing with loss was remarkable to Jessie, she could not get herself to simply move forward with life, the way her mom did. It seemed that the

transition into retirement was much less impactful than the loss of her caregiving role for her mother. Jessie described her situation as being lost, adrift and awkward. It was at this point in her life she truly understood what having purpose in life was all about, or in this case realizing she did not have a purpose. It might have been the deepness of this loss that allowed Jessie the time to reflect and accept what the Purpose Project exercise would show her.

***Facing Fear.*** Jessie's journey was about helping others face their fear. Whether she prepped someone to make a speech, be on camera, or find comfort petting an animal, Jessie's purpose was about being a support person.

Jessie had to learn to face her own fears. She did NOT want to go to the Purpose Project workshop but she did. She rejected the calling card exercise for herself even though she saw the tremendous value it provided her exercise partner. For whatever reason, Jessie did not want to accept the outcome of the exercises. She could not explain why she rejected "Awakening Spirit" for so long, but finally accepted it when she was ready.

Finding great value in the examples of facing fear set by her mother, Jessie was completely lost when her mom died. She spoke proudly of how her mother bravely faced her cancer, and how mom grieved dad's death in a very practical and healthy way by letting go and moving on. Jessie, however, became stuck when Mom died and could not move on right away. Perhaps Jessie did not have someone to help her face her own fears the way she did for others. Jessie claimed that the final piece of accepting her calling card was the need to "awaken her own spirit," a feat she eventually learned to do. Perhaps it was that step that allowed Jessie to move on from her mom's death.

***Moving forward with purpose.*** A clear indication that Jessie continued to live a life of awakening spirits is attached to the end of a leash that went everywhere with her. Jessie's dog

“Biscuit” was a therapy animal that traveled to hospitals, nursing homes, special education classrooms and even breakfast café’s for dissertation interviews. Jessie proudly described the feeling of satisfaction when children who are normally afraid of dogs, feel comfortable enough to pet and interact with Biscuit. Jessie commented that people are willing to talk about themselves when they are petting a dog. In a way, I believe it is Jessie’s way to continue to be a number two, while making Biscuit the star of the show.

Jessie brought her self-defined meaning for life wherever she went. For example, while spending three months in the hospital recovering from an ailment, Jessie set up an arts and crafts area in her hospital room. She encouraged doctors and nurses to make Christmas trees and angels out of play dough and learned that when they came after shifts to get creative, they talked about their struggles, their challenges, and their goals. As always, Jessie allowed them to vent, then reflected back what she heard, making these medical professionals leave her room with a play dough figure, but also a clearer vision about their own spirit. This demonstrates yet another way that Jessie converted her embracing of her own purpose in life, into awakening the spirit of others. Her ability to connect with herself had illuminated her ability to get others to connect with themselves.

**Summary.** Jessie proudly raved about her mother’s courageous attitudes as she faced illness, death, loss of her spouse and other life struggles. Jessie said she learned a lot from her mother and was deeply saddened when she died. Once Jessie was able to let her mother go, by accepting the death, Jessie began to learn about herself. She used workshops, experience and self-reflection to understand why she did certain things and felt a certain way. Jessie’s journey required her to face her own fears now and when she did, her rejection turned to embracing.

Finally the most remarkable finding in my interview with Jessie was her clear understanding of the value of purpose in what people do. She learned that while people often talk about their jobs or their roles, they seldom think deeper about what the purpose of their chosen career is really about. Understanding her own purpose, Jessie made sense of the jobs she always had, and felt good about what she did even if it did not feel good at the time. A business card does not truly represent the value our jobs bring. Jessie felt lost without a business card at the Purpose Project, but felt joy when she uncovered her life's purpose.

I needed that day (at the purpose project) to crystallize what I was all about in the first place. To figure out (going through transition) isn't a whole hog change at all. But I've learned not to look at the business card, but at the purpose of what I have been serving. I always looked at the job description...but realized now what's most important is 'other duties as assigned.'

#### **Case #2- Richard, "Don't commit to stupid stuff"**

Richard was in his mid-60's and lived with his wife about thirty miles west of Minneapolis. His marriage was successful, he said, because he and his wife knew each other so well and shared similar views on just about everything. The youngest of three boys, he grew up on a family farm and attended a one room schoolhouse. Richard had adult children of his own, and built a strong friendship circle through his church and weekly breakfast meetings with a faith support group. Richard retired "a few years ago," and took the Purpose Project workshop shortly after retirement upon a suggestion from his wife.

Still unsure of what to declare as his major in college, Richard returned home one weekend and learned from his brother that a man stopped by who wanted to do a story about their family's farm. When his brother described how the journalist asked questions, took photos and learned what type of farming the family did, Richard knew right then and there he wanted that kind of job. "It just made sense to me," Richard explained with excitement in his voice. He elaborated with enthusiasm:

As soon as (my brother) said that, I knew I (was interested in that job). I get that, I like that, I want that. What made sense is that my brother described to me a picture, and I saw that picture in my mind, and I went, YUP I want to do that....that could have been one of the most, actually is one of the most significant turning points in my life, was that comment from one of my older brothers on that one Saturday....that is what set my life in motion, was that one happening. And it all occurred because that one guy showed up, and my brother described it in a way that I could picture doing that in my mind.

Richard made it a point to only follow things in life that made sense to him. In fact, he claimed that is why he was able to spend a life doing things he truly enjoyed. Richard was very clear in what events were instrumental in his life, and why he enjoyed certain activities.

Richard attended his first Cursillo in 1979 when he was thirty-two years old. A Cursillo, according to Richard, is a short course in Christianity that often occurs over a three day weekend.

You go through a three day Cursillo weekend...men go on a men's weekend, and the women go the next weekend. And that weekend for me was very important for me from a purpose standpoint because I saw a vision of a purpose for me which I hadn't really been fulfilling to that point, which was to honor and glorify God in all that I do...I took it seriously and I have been in a weekly support group for thirty-two years. In fact I had breakfast every Wednesday morning with the same group of guys for twenty-six years. We learned to be accountable to each other and to use the other guys as a support mechanism.

Richard's explanation and the excitement in his voice clearly articulated that not only did these two separate events impact his life, but served as milestones on what gave his life purpose over the years. He also attributed living a full and fulfilling life to the choices he had made along the way.

Every day for me is a gift. And I fill it with stuff I like to do...I worked hard in my life to not get trapped into stupid stuff, you know stuff I am not good at, and stuff I don't like...I've been given the ability to discern stuff that is stupid and I should ignore, like accounting, bookkeeping, legal or investments or whatever. I don't do it, I hate it, I'm not good at it. It depresses me.

Richard continued his love of writing and his love for God in activities that supported both interests. He participated in a prison ministry group that conducted Cursillo weekends for inmates, an activity he participated in ever since his first experience with Cursillo. But Richard

also liked to write for the ministry. He explained that writing is something he is good at, and served a great purpose.

I loved the art of writing, and the skill of writing. And having the writing be good writing. When I learned about what makes a good story, you know the what, when, where, and how, the pyramid of a story...I got that, it made sense, that's good writing... I've always loved the ability to write clearly. I was always driven by the message that was to be communicated to the target audience...I put (the audience) into my mind, the front of my mind, and thought about what the target audience needed to hear.

During his working career, the actual writing, and not the topic, was of most interest to Richard. No matter what he was writing about, it was important to him to connect with the audience he was writing for in a deep way. Richard's writing in retirement served more of a dual purpose, to educate the reader but also to further the understanding of one of his personal interests like gardening, and prison ministry.

Richard explained that writing about the work of prison ministry, and Cursillo in prisons, allowed him the opportunity to promote the work of his friends and himself, and ultimately God's work. He spoke about how the target audiences for those stories are people who may not understand the ministry. His job, in addition to working with a ministry team, is also to tell others about how it worked and the success that they had. Richard also commented that most of his friends are now those he worships with, or those who participate with him on the prison ministry teams. He enjoyed having friends who shared not only the same activities but also the same values in life.

The clearness of purpose for Richard's life was very apparent. He stated that his transition to retirement went about "very seamlessly" because he had been doing so many of the things he enjoyed prior to retiring. That seamless transition he said brought him great joy and fulfillment.

In addition to writing, prison ministry and Cursillo, Richard participated in a Master Gardener program.

I became aware of the (university) Master Gardener Program...I liked the subject but the training was such that it was 50 hour program where it was taught in 2 hour modules....I mean what's not to like about that...To me the Master Gardener Model is one of the greatest models ever developed for volunteer contributions. Because the master gardener, number one gets really good education for a modest fee, and number two the master gardener chooses where and what area (he or she) wants to volunteer in. And thirdly, since the recipient of the work, the homeowner, has a problem, and the master gardener gets to solve the problem. So the model, as a volunteer model isn't duplicated anywhere else. It's a model that really works, and not developed in churches or in government. I was passionate about trees...so for me the master gardener and tree care advisor programs made sense.

Richard also attributed his ability to pursue meaningful activities in retirement to his parents who taught him several things. He described his mother as a one room school teacher who taught Richard a great deal about language and writing. He joked that when his two older brothers were learning farming, his mother told his dad that she "got to have" one son to teach language and such. That son was Richard.

Richard's father was a very dedicated farmer who taught Richard the value of possessing a hard work ethic.

I had a marvelous role model in my father. I even wrote a story about him. My dad loved to work and he loved to sweat, and his gift to me was he taught me those values from an early age....I was driven in my career by the work ethic of a person ...the purpose of a job is to get a paycheck, but the other purpose of a job is to do it as best you can...to me that always made sense.....I never stayed in a job that I thought was stupid, or not worthy of my time or attention.

Finally, Richard enjoyed woodworking. In addition to wooden spoons, cribbage boards and shoe horns, Richard created beautiful wooden crosses. He always had a "pocket cross" ready to hand to people he met in hopes that they too kept it in their pocket as a reminder of their own journey with Christ. He gave me one, and I have carried it in my pocket ever since the



interview. It reminded me of a remarkable man, with obvious passion in his life, but more importantly, clear knowledge of how he found meaning and purpose.

### **Case analysis.**

*The value of purpose.* Although attending the Purpose Project was his wife's idea, Richard attributed his participation to be of great importance. It was a time to reflect on the mileposts and growth periods he experienced in life. The opportunity to examine his life journey validated the decisions Richard made to always follow his heart. The three most pivotal events in his life, according to Richard, were graduating college, meeting the agricultural journalist and attending his first Cursillo event. Those events provided Richard a practical education, a career, and a path in which to live out his spiritual beliefs. More importantly, he said those events reflected who he was as a person. Richard seemed to speak in a humble yet prideful manner. He described living a life that was true to his core, and allowed him to reflect his beliefs and knowledge to others through writing and ministry.

Retirement came easy to Richard. Because he lived a very full and enriched life outside of work, there was very little transition for him from his working days to retirement. Richard knew who he was, what was important and what he enjoyed about life. He spoke with pride about doing things with your time before retirement that are meaningful, and not waiting until after your work career is over to pursue your passions.

While activities reflected living a purpose filled life for Richard, it was the deep connection to his internal self that provided direction. If there were any line at all that divided "work" and "non-work" related activities for Richard, it was a very fine one. Richard did not find meaning in everything he did, but rather, only did the things he thought were meaningful. This knowledge and clarity of purpose seemed to serve Richard well in life.

*Always doing what he liked.* With a clear ability to articulate meaningful activities in life Richard reiterated several times that he did things that made sense to him. Marrying his wife seemed very practical to him as they both came from large families, shared similar views on money, religion, work ethic, and child rearing. He credited an easy adjustment to marriage as he knew his wife so well before their wedding. Richard said, “It made great sense to marry my wife.”

When the career of agricultural journalism was presented to Richard, he grasped the concept immediately and decided he “wanted to do that.” He said that type of career made sense to him. When his mother showed him how to construct strong sentences, he followed the path of writing because that too made logical sense. There was nothing fancy about finding meaning in life for Richard, as he said it simply had to do with doing the things you understood and enjoyed.

Richard also had a penchant for organizations that were well structured and organized. He got involved with a master gardener program as a way to volunteer his time and talent because the program was set up so well. He immediately saw the benefit for himself, the organization and the people he was helping. He called it, “The best model for volunteering.” One of Richard’s outlets for spreading God’s word is through prison ministry. He liked the volunteer model this program presented. Richard’s passion for writing also grew when he took a basic reporting class in college that taught him the “pyramid of story writing,” a common sense way to write a good story.

Just as important as being involved in activities of his liking, Richard was equally gifted in ascertaining the things he did not like. He termed things he was not good at, enjoyed or was not interested in as “stupid stuff.” How Richard learned and decided to never do the “stupid stuff” in life remains unclear, but the message resonated strongly in his story. Even his deep

belief in working in the church could not convince him to coordinate an annual blood event. Richard said he quit the coordinator position right away because, “I hated it. I didn’t like it. I wasn’t good at it. I’m lucky to know what stuff I like to do and stay away from the stupid stuff.” While getting to know Richard over the course of an hour, I am sure he did not believe the idea of a blood bank was stupid, but rather he disliked the role of serving as the coordinator.

Although he led many Cursillo events over the years, and enjoyed the work immensely, Richard seemed to deviate from his normal decision making guide when he attended his first weekend retreat. Richard said he was led to the Cursillo in 1979 to learn how to become a better person, live a life that served others more than himself as well as to glorify God. It seemed that Richard was not comfortable with his life at the time, and he knew that he needed to search for ways to become a better man. Instinctively, he felt a void and knew he strayed from a path that was important to him. So he did not attend his inaugural Cursillo because it made sense, or was something he knew he would like, he said he was led by other unknown reasons from inside himself. Richard said he just knew he needed to go.

***Transition in writing.*** Always writing with a clear vision of his audience, Richard claimed that the topic he wrote about was irrelevant to him. He wrote some personally meaningful pieces about his father’s gift of work ethic, for example, but normally he was more focused on the art of writing a good story for the intended audience. In retirement, he wrote to educate people about gardening and ministry work, topics he was passionate about. When pressed on the inspiration for his writing now versus writing as a career, Richard acknowledged the change in approach, but had no clear reason for it. This change could exemplify the transition of performing one’s lifework for income and necessity, to continuing the same or

similar activities in retirement for more personal reasons. Since he assigned his own writing topics in retirement, it made sense to write about something he enjoyed.

***Pulling meaning together.*** It was clear that Richard had a keen ability to synthesize what was meaningful to him. Growing up he learned hard work and farming from his father, and the art of writing from his mother. Therefore, Richard took his writing career very seriously and said it was important to do “good work” to make his stories clear and meaningful to his audience. In retirement, Richard keenly combined a love of woodworking, writing, prison ministry and master gardening. He constructed meaningful stories and wooden crosses as a way to demonstrate his passions. Knowing on a very deep level what value each of these activities held for him, Richard found ways to “enjoy two of them at once” without losing the meaning in the individual activity.

Another way Richard combined what was important to him was the selection of friend groups in retirement. Richard and his wife focused on people who shared a passion for the church and spreading the gospel message together. He enjoyed people but wanted his time spent with them to be meaningful and useful to the other passions in his life.

**Summary.** Richard never specifically labeled his purpose in his life but was clearly able to follow meaningful work and activities. As an individual with a strong inner direction that served others, Richard’s seamless transitions throughout life have been very satisfying to him. True to his inner self, Richard’s method of living a meaningful life seemed simple and clear but very deep. He summed up his journey as follows:

When my career was done, I still had a full life, because I had developed all these other things. The insight for me was not that I had a master plan, but rather, I had a spirit that was instilled in me by parents, pedigree, mentors, (experiences)...I would say God showed me purpose. God revealed purpose to me. I would say not every day is real clear...but I’m willing to reexamine every day...I’m honest with myself...I’m not a fraud in my own mind.

**Case #3- Judy, “We had cancer”**

Judy, age 59, took the Purpose Project in February of 2012. The date of the workshop fell precisely on the one year anniversary of her husband’s death. Judy quit her job in January 2013 and was busy learning about herself, her new life, and writing books to talk about her “fuzzy place” experience. She lived in Northern Minnesota and had six adult children.

They had it all planned out. Judy and her husband Anthony were going to work for a few more years, retire, and then take the honeymoon they never had. In fact, they planned for their whole retirement period to be like their honeymoon together. Getting married in her twenties, Judy had six children to care for. Three kids came with Anthony, one was hers and they had two children together. Judy was a grandmother before she reached the age of thirty. She described her retirement plan.

Our retirement was going to be OUR time...We had a plan to bridge a financial gap with Anthony retiring later, me retiring earlier and then it would finally be just the two of us...Until one day when Anthony couldn’t get out of bed. Retirement at that point went out the window. Any planning we had done, out the window. Out. The. Window. We had cancer.

The planning for Anthony and Judy changed from how to live their dream retirement to how to treat his terminal cancer. Judy was shocked when the emergency room diagnosis was cancer. “Our world changed on a dime,” Judy said. Suddenly, there were many decisions for her, for him and for them. The most critical of decisions came a few years later. A life support decision Judy thought they prepared for.

Long before “they” had cancer, Anthony and Judy visited an attorney to prepare living wills and other legal documents. The attorney took great care to go through the paperwork but also to explain a few things he felt Anthony and Judy had not considered.

(Our attorney) sat down and said, “Just because modern medicine can do something doesn’t mean they should”...That five minute sound bite years ago

was incredibly useful...I put Anthony on life support because he couldn't breathe...It allowed me to talk to Doctor (name withheld) to say that when we get to this point, the (fuzzy place), we need to have a conversation about this...When we get there I need you talk to me. And be brutally honest with me. I realized that the (doctors) were not making a decision for me...Then I realized I was not making a decision, we had a health care directive, and I just needed to execute (Anthony's) wishes.

Judy said, intellectually she knew how to execute the health care directive for Anthony, but emotionally she was not ready to take Anthony off life support. She remembered the attorney's words, which helped, but it was still a gut wrenching time for her. Judy said she felt blindsided. After Anthony died Judy put herself back to work.

I had a mega job at a mega company, so I plowed back to work...twelve to fourteen hour days...I lied to myself a lot. And I lied to my co-workers. As a telecommuter its real easy to tell everyone 'I'm fine'...No one sees you. No one at works sees you...So you tell them 'I have a cold,' or my 'Allergies are kicking in' (when sniffing on the phone after crying). 'I'm fine,' I would tell them.

Judy was not fine. She hit a wall a few months after her husband's death and looked for another job in the company. When that effort did not turn up anything of interest she quit.

I realized my job didn't fit...Then I realized the whole thing didn't fit...(My job) met the future needs of our retirement that I had, married to Anthony...It filled the time, it filled the financial things, it gave us health benefits, it moved us in the direction (of retirement).

Judy began writing. A friend told her writing would help her with grief so Judy started a blog. The blog turned into a book. The book turned into a news story.

My passion and purpose now is to talk about health care planning...What Anthony gave me is a gift. And what most people don't understand is what it is really like to have to emotionally make a decision, and you are terrified it's the wrong decision, but knowing you are honoring the wishes of (the sick person).

Judy's book, called *The Fuzzy Place* (pseudonym) was used in churches, hospitals and hospice. Her book was about being alone in the fuzzy place, when you have to make a difficult decision on behalf of someone you love. She claimed that for someone with only eleven credits

of college to her name, and no writing experience, it was a pretty darn good book. While the book helped Judy move forward, and uncover a self-described profoundly strong purpose in life, she later felt the need to write two more books. Judy realized that discussing her troubling emotional decision to take her husband off of life support was only the start. She needed to share more stories to help herself and others move all the way through the grieving process. She said she could not leave people, her readers, stuck in that fuzzy place.

Judy worked hard at keeping her life moving forward. While much of this was all still pretty new, she was learning about herself in ways she never imagined. Judy had learned that slowing down and listening to her body allowed her time to follow what she knew, deep down, was important to her. The summer after Anthony's death, Judy spent time in the hospital with symptoms of a heart attack. She reflected:

If I would have not listened to my physical self as well as my emotional self I would have missed what the universe was telling me. (Getting sick) was truly my heart and body telling me to stop (working). The difference was I listened this time.

Since taking the Purpose Project Judy focused on herself. She said she had few friends and needed to learn how to be a friend. She began dating again and was learning how to let someone new into her life. However, with her children grown she felt alone. She was happy to have retired and was energized by trying new things such as writing and attending seminars and workshops. Judy said she was healing.

### **Case analysis.**

***Rebuilding self.*** Judy calmly spoke about being terrified to be alone. She realized how alone she felt when she made the decision to end Anthony's life support. Even though so many people cared and supported her during his illness, Judy felt physically and emotionally alone. She isolated herself even more by quitting her job. Because Judy telecommuted for the majority of

her job, there were no co-workers around most of the time but retiring still cut off another source of interaction with people. Judy suddenly was no longer a wife, a partner, caregiver, boss, and mother of growing children.

Outwardly Judy explored writing and telling her story even though she said it was not very comfortable for her to do so. She did not want the attention but “allowed it to happen” because “that was what needed to happen to get the story out.” Although being a very private person, Judy allowed herself and her story to be shared in public, which helped her open the door to other people. Judy was opening up.

Married at the age of twenty-two, with so many children to care for, Judy had no time to have friends she said. She called herself “six-zero going on one-six,” referring to her feeling like a teenage girl looking for friends even if she were sixty years old. While she might have had little time to spend with friends while raising children, Judy was also a very private person at work. She interacted with hundreds of people but purposely did not establish friendships with any of them. Judy wanted to keep a line between being friendly with her direct reports and being their manager. Therefore, her desire to not have friends, in the workplace at least, was more by design than simply not having the time to develop friendships. But Judy now was trying to be a friend.

Judy decided to call herself “solo” as she felt being labeled as “single” meant you are looking for a partner, and a “widow” meant you were still grieving. Symbolically this was a step for Judy to move through her grief. Inwardly she began to analyze what solo meant to her. She had never been this alone before and it forced her to think about whom she was and what was now important. Judy, I believe, was on a journey of inward reflection. She was learning about herself, and changing along the way. She sought out new workshops and seminars in which to



continue to learn more. Finding workshops focused on writing or purpose seeking useful, Judy continued on a journey of learning how her new life could unfold.

*Was writing about grief Judy's purpose?* While Judy spoke clearly and confidently about the gift of writing for others on health care directives and difficult health decisions, her vulnerability seemed very out of character. She introduced that fact. Being a private person both personally and at work, I wonder how much the writing was really for others versus for herself. Not to say that the blogs, books and articles were not useful and generous on Judy's behalf, but it could be a coping and grieving bridge as Judy looked to let go of the past to begin a new chapter in life.

That said, Judy's life became much different, so perhaps the exposure of her story was part of her new self. Even after publishing her first book, she was not afraid to plan two more books which indicated that the vulnerability and exposure did not cause her to go back into the protection of her private life. Perhaps Judy's book was about asking others to join her on her path to healing. Judy said:

(Allowing exposure) is the right thing to do. When you talk about purpose, talk about true purpose, there is always a cost. The cost is exposure. And for me as a private person, you get to see what's in my head. People that read my book are taking my story, and making it their story.

**Summary.** Transitions in life can be planned or unplanned. They can be devastating or motivating. Judy's transition, while continuing to evolve, took place over several years. She lost her partner at diagnosis, her husband at death, and her plan to start living life at retirement along the way. In the end, Judy was finding herself. She was learning how to be a friend, an author, to have her private life exposed, how to help others heal and how to be solo. Judy was learning how to be a friend to herself. Whether teaching others about being in the fuzzy place was Judy's purpose or not, she used the experience to pull herself through grief, loss, and a transition to new

roles in life. Regardless of whether Judy continued with this purpose in life, it seemed to fit her life perfectly for moving through a transition with many different components.

#### **Case #4- Rose, “I wish I had quit long before”**

Rose, age 60, retired from her corporate attorney position in 2010 and took the Purpose Project two or three years prior. Her goal for the workshop was to prepare herself for the retirement transition, even though she was not worried about having enough to do post career. Rose’s husband retired three years prior to her, but eventually returned to work and continued in his law practice. Rose had an adult married daughter.

Given the era in which she became an attorney, Rose said there was a lot of fight in her, as a female, to prove her credibility. While she never necessarily held a defined goal or benchmark for accomplishment in her career, Rose worked hard. She worked very hard. But even without an ultimate goal, Rose said she was always striving for something. She said she shared this “striving mentality” with her colleagues and social circle. Rose claimed that wherever she went the people around her focused their lives on getting to the next thing, striving for the next thing, whatever that “thing” may be. Once retired, life came along quite a bit easier, and Rose enjoyed that.

It’s a nice thing to feel like you don’t always have to be stretching, improving, or competing... I think you spend the first part of your life acquiring things, material things, education, then you get to a point where all that stuff isn’t important anymore. I retired at 57 so I retired early. So I made a choice between having more money or having more time.

Time was a valuable commodity that Rose never knew she owned until planning for her retirement. Like most of her personal and professional friends, Rose said she had high expectations of herself to achieve and grow before she retired. When working, she spent her time constantly trying to better herself, moving from one important endeavor to the next. Rose reflected:

It's really hard (laughs) not to get sucked into equating financial success and having stuff and having...a good life. I haven't always felt this way...That is a battle for people that are driven and highly motivated...And I have tended to hang out with people like that. More and more I am trying very hard to define myself by what I do versus what I am. That's a very important issue.

In addition to wanting time more than money, Rose also spoke about the changing dynamics in her legal profession. She became an attorney as she enjoyed putting pieces together to solve problems, and her job allowed her to do that. However, Rose said that over the last decade the work of many corporate attorneys in the financial industry had changed. She said the job no longer fit how she wanted to practice law and she lost interest.

Claiming to be not much of a planner, Rose always had more things to do, then time to do them. But once she actually retired, Rose found a gift. She really enjoyed people. Not that Rose did not enjoy people before retirement, she just realized now more than ever how much people are more important to her than "stuff."

Wherever I am people are the most important thing. I think I knew that all along but didn't really realize it until looking back. (I started looking back) after I retired. Up until then I really didn't have the luxury of looking back...I was running at full tilt...It is validating to learn that people are important...I guess if I had a wish of anything I would have started (not striving) sooner. I know I can't go back, but I can now. I fight every day not to be improving, not to do everyone one better. That striving thing is hard on a person...but we do it to ourselves.

Rose also believed that if she had learned that people were the most important thing in her life before she retired she would have enjoyed her work more.

I would have been more collegial, more supportive of other people. Probably a better mentor...I don't judge myself too harshly...but if I had more self-confidence and a clear vision that is what I really wanted, I would have been better at (being more supportive). I do think (my work) would have gone better.

Life for Rose became more enjoyable in retirement. She said luck was on her side to be selected as a museum docent, a very informed tour guide, at a local art gallery. She also spent

time with her husband doing things that did not involve taking care of and maintaining their “stuff.” Rose, however, realized that with age came wisdom but it also brought loss.

As you get older life isn't easy. I've had friends die, their bodies are falling apart, they are losing their parents...life can get pretty grim...I was a long distance runner and I miss it terribly (laughs). It's a HUGE loss. I really mourned the loss of being able to run (due to bad knees)...once you are injured you feel more fragile.

Rose and her friends also discussed their perceived loss of physical beauty.

None of us ever thought we were very vain, but now that we are no longer beautiful we are like OH MY GOD WHAT HAPPENED? And it was a wakeup call, I never have been a high maintenance type but it's been very hard...especially for women because so much of who you are is how you look.

Relieved to be out of the corporate world, Rose took every opportunity to spend time outdoors. She claimed to not be a terribly spiritual person but nature served as her main connection to spirituality and God. Reading, travel and laughing with family took up most of her time along with the aforementioned work at the art gallery, and just spending time with her husband. All in all, Rose found a way to be present with herself rather than worrying about what the next day will bring. Moving away from the work as an attorney was comfortable, not that shedding that image was important to Rose. What became important to Rose, however, was the enjoyment of her new found fulfillment of “being” versus “doing,” but with a slight concern for what loss may be around the corner.

It's a luxury to live in the present. Not have to worry about ...job related stuff...and not having to prepare for the next thing...I would say now more than ever I am living in the present. With a little bit of dread about the future.

### **Case analysis.**

***Major changes in view about her life.*** The core of Rose's story was how she changed. The change started while she was still practicing law and Rose realized her firm was not the same.

Priorities and business practices no longer aligned with her beliefs so Rose retired and never looked back. But it seemed her decision to retire was much more than a corporate shift.

Rose realized she would rather have more time than more money. This decision created a discussion with her husband about future tradeoffs in planning their purchases. Knowing their financial picture would be significantly altered, Rose explained the value of owning their time compared to owning the ability to buy whatever they wanted. Curiously, her husband returned to work shortly after retiring, which Rose explained as his inability to turn work off for himself. His decision did not sway Rose from the desire to control her own time, however.

The change for Rose was an internal change as she learned the value of people over stuff, being versus doing and a desire to be recognized for who she was versus what she did. It seemed Rose “relinquished” her career which afforded her the time to “reflect” and “redefine” who she was. Her actions were consistent with Sundstrom, Burnham and Burnham’s (2007) model of moving through grief.

Her revelation was about people. She never thought spending a day with people in an art gallery would provide her so much pleasure but it did. When describing this experience Rose gloated about the value of meeting so many different types of groups, rather than how good it felt to share her new found expertise on art. This differed from her career as an attorney where she relished her knowledge of law and protection of the firm. The interaction with people was now more important than what she knew.

Rose always relished the relationships with family and friends, and sharing a good laugh with them, but now saw friendships from different perspectives. While all friends remained “dear to her,” she noticed those who continue to strive for things in life and those that do not. Rose also sought out new groups of friends who held views and experiences much different than

her own. She found that being around these new people was profoundly enjoyable as she was able to learn new things.

Rose's purposeful reflection also brought insight to how she might have lived life differently had she known then what she did now. To be a more "people oriented attorney" might have resulted in a different work experience, a more enjoyable experience, but Rose demonstrated wisdom in not judging herself too harshly. She realized that people all learn and grow as they age and mature. Rose's story about change was a wonderful reflection of growth and a smooth transition into retirement.

*Facing loss as she aged.* Growth often came with aging and with aging brought loss for Rose and her friends. She spoke softly as she described the number of friends, and parents of friends that have died or became ill. She reflected on the worry she had about herself and her husband if illness ever strikes their lives. Losing the ability to run was a permanent dagger to some activities Rose thoroughly enjoyed. To compensate, Rose tried to volunteer at a marathon the year after her debilitating injury. She left in tears with the unsatisfied desire to participate in the race. She did not want to have to settle to be a race volunteer who handed out water cups to the racers.

Of striking contrast was Rose's clean break from the law practice compared to the painful experience of losing a joyful activity. Rose easily shed her law career by seeing so many other things she could do with her time. However, losing her ability to run left her depressed and focused on what she could no longer do. Perhaps a loss by circumstance is dealt with differently than a loss of one's own choosing.

*Unpacking her bags.* Leider (2010) wrote about the value of "unpacking your bags" heading into retirement. His metaphor for unloading the beliefs and physical items people

collected through life fit Rose's story perfectly. She described emphatically her disdain for the time it took to maintain homes, yards, and vehicles. Rose had felt fulfilled when acquiring material things in life but now the same items she viewed as bothersome clutter.

Her insight to her previous desire to accumulate education, knowledge and degrees was very interesting. Rose was thrilled to no longer be consumed with personal pressure to strive to attain something more in her life. Actually, her new vision on life allowed her to re-purpose her skills. As a follow-up to her disclosure on the discovery about the value of people in her life, I asked what made her a good friend. Rose claimed that she was able to give good advice because her career allowed her to develop excellent problem solving skills. So while she unpacked her bags, whether she realized it or not, Rose continued to use some of the tools she accumulated in a new way.

Most importantly I believe Rose unpacked her views on how she wanted others to know her. Her retirement reflection provided insight into who Rose was versus what she was. She happily announced that she used to be an attorney but went on to say that she now focused on a desire to be seen for what she believed versus what she knew.

*Effects of money.* Rose had an important revelation about money in her life. As she contemplated retirement, she realized that instead of saving money she and her husband would now be spending it. Once they both retired, what they had saved was all they were going to have. This, I believe, started her thought about what money meant in her life, and what she would have to sacrifice in order to retire. It was through this reflection that she realized that her time was more valuable than the ability to buy whatever, or do whatever she wanted. Rose was then clear on her decision to be rather than to have or do, which she admitted was not always the case when she was working. Who Rose was as a person became more important than her

possessions, degrees, jobs or travels. Her reflection on income was actually a catalyst for the insight into herself and what was really important to her.

**Summary.** Rose felt fulfilled in retirement because she had a better understanding of who she was. She broadened her group of friends and associates as her view of herself expanded. She used her acquired skills in new applications. The ease in shedding her career and experiencing a new way of life was not mirrored in the other losses she feared and experienced. She viewed loss through different lenses depending on her attachment to them. Most of all Rose learned to be present. She realized that striving and moving too fast through life was no way to live but rather chose a slower pace that allowed more reflection and appreciation of relationships.

**Case #5- Lois, “I think I would die if I didn’t have purpose”**

The Purpose Project was one of many workshops for Lois, age 62, who used the seminar material she learned both personally and in her work. Married with an adult son, Lois spent her career as a registered nurse, a wellness management consultant for local businesses, and a faith community nurse. Living in Minnesota most of her life, Lois and her husband moved to the East Coast for two years to be close to their son and grandchild. They returned to the suburbs of Minneapolis where both worked in a part time capacity.

Lois said she learned about living a purposeful life at an early age. Knowing that “taking care of others” was a clear message from her parents growing up, Lois was heavily involved in her church, the local 4-H group, and helping her grandparents around the house. But one of the clearest memories for Lois growing up was standing up to bullies on the school bus. She reacted strongly when boys, three to four years older, picked on younger students by slamming school books on their heads. She recalled some of the ways she learned about living a life of taking care of others.



I remember standing up to the kids that were getting bullied...(laughs) I really was not afraid to stand up to these guys even though I was in seventh grade and they were in like eleventh grade...I think (knowing my purpose) is a combination of genetics and how I was raised...Our parents feed us more than baby food, they feed us the messages of values of what is important to them.

Lois felt strongly about the impact parents have on the path of their children's lives. She lit up and spoke proudly when explaining her father and mother's direct influence on how living with a purpose had affected her life.

When I think about my parents, my dad first of all was an extremely purposeful person. One of the biggest dilemmas was that as he got older was that he just made himself crazy that he didn't have something every day that would make a difference. And when his health problems got worse we saw him get depressed when he couldn't contribute (to society) the way he thought he should....My mom was extremely loving, caring, compassionate...very active in the church, and very active on the health board for the county.

Lois never labeled her actions in life as "purpose" until she and her husband began working with a "well informed" financial advisor. It was through the advisor's questions that Lois connected purpose and meaning with the life of service she lived.

The other thing I REALLY have to say is we had a financial advisor who was sooo focused on purpose...every time we came the first part of the meeting was how was your life feeling to you. (We were asked) "What do you want from your life? What are your values?"...that really helped us put together the financial piece....that was very helpful to us.

The timing for labeling her actions as "purpose" was irrelevant to Lois. Each of her professional jobs served a purpose for her purpose but as she described the roles, it seemed that one role grew into the next as meaning in life continued to unfold.

The very first nurses were nuns you know...So when I was in nursing school the model of nursing was primary care, which meant the nurse is there to take care of the physical, spiritual, emotional and the social needs, the whole gamut...and I think what has happened to the health care system is that (role) has eroded...after a while I couldn't fulfill the holistic needs of the patients assigned to me. The needs were just too overwhelming and I would have six or seven patients to care for.

Lois moved from a registered nursing role to that of a consultant who worked with organizations to provide wellness for its employees in both physical and emotional arenas. She liked the consultant role more than nursing because it helped her demonstrate to people how the body connects physical condition with emotions. Lois reflected that treating the physical, emotional and spiritual needs of a patient became her purpose.

After a brief move out of state, Lois thought she was done with nursing and the consulting roles and contemplated a full retirement. Then she learned about a developing field called faith community nursing.

A parish nurse is a registered nurse that has gone through additional training...I visit (patients) as an RN but talk to them about how their physical health relates to their spiritual and emotional health...I thought I was done being a nurse...I had my management consultant business. But when I retired I looked at options and this clicked...it's very fulfilling. And I feel very blessed and privileged to be able to do this at this time in life.

Finding and living a life of purpose had not always been easy for Lois, however. She spoke about many challenges she experienced throughout life, including some very deep hurt. She called those times her "narrow experiences," a term she learned attending the Purpose Project workshop. Narrow times, according to Lois, are life periods like sand falling through an hour glass. A person feels stress and tension for a short time, but know that eventually the pain will subside and everything will be alright once they pass through the narrow part of life. For example, Lois described a time in life where she had expectations of her son and new grandchild and what type of role she would have in their lives. When the relationship did not turn out to be the way she wanted, she was crushed. But Lois knew that once she worked through the empty feeling she had during this narrow space, there would eventually be some sort of relationship established over time. Lois used her narrow space experiences to relate to what others are going through in troubling times. She described her supporting philosophy as follows,

“Going through those narrow spaces are difficult and tough but you make it through a different person...you emerge actually being healthier because of the experience.”

It is through the faith based nursing program that Lois continued to grow both herself and the profession. She participated in boards and mentoring programs in hopes of creating a legacy so that others could continue in her path. Sometimes Lois found herself out of balance, by focusing too much on others' needs and not enough on her own.

I tend to be the one that listens versus the one that expects someone to listen to me, so I probably don't ask others to listen to me....so the challenge for me now is where do I set the boundaries? So that as a semi-retired person I am finding purpose in other parts of my life so I don't get out of balance.

The other interesting phenomenon to Lois was the change in the group of friends she and her husband spent most of their time with. Having participated in a group of five couples in many social settings, she recognized a significant change in the relationships. Lois attributed this mainly to the loss of common interests among the couples.

What we see now is that the majority of these couples have retired, they don't really seem focused on a purpose. They are glad to be retired...but me particularly I can't say much about what we are doing...because I am afraid it comes off as being self-righteous. You know they are out playing golf and spending time with grandkids, which is great, and they enjoy that, but I am out doing this...and (my husband and I feel) we can't talk about what happens in our life.

### **Case analysis.**

*Need to be needed.* With so many examples of giving, it appeared obvious that Lois lived a life of caring for other people. Lois was a thoughtful person who said she felt valued when providing compassion and care to a person in need. However, she continued to feel out of balance with her caregiving and said that she often neglected to ask others to support her.

Might Lois' self-prescribed purpose in life be the only place she felt needed or valued? Lois offered the story of watching her father's aging lead him to depression from not being able

to contribute to society in a meaningful way. Was aging also Lois' fear for herself? She stated several times that if she could no longer take care of others, which was her purpose in life, she "would rather die." If taking care of others was the only thing in life Lois found fulfilling, it seemed logical that she would fear aging and no longer being able live her purpose. Lois planned for her aging by working hard to grow the faith community nursing field. She led organizations and mentored younger nurses as a way to stay involved in the field when aging may take away her physical abilities.

*Purpose led transitions.* Lois said she became interested in nursing in the 1970s to care for people and was trained to treat the emotional, physical and psychological needs of patients. When the nursing profession changed, Lois was resourceful in finding new ways to do the type of work she wanted to do. While caregiving was always important to her, it seemed that establishing a deeper relationship with the patient was just as important to Lois as evaluating and treating a physical ailment. When the nursing industry changed, Lois found new roles, but did not change the foundation of care she believed in. In this case, her commitment to purpose seemed to guide her through decisions and transitions to step away from jobs that were not totally fulfilling.

Moving across country to help take care of a new grandchild was important to Lois but was met with resistance. For whatever reason, her son had a different idea for Lois' role in the baby's life. While this was hurtful for Lois, she said she learned that she cannot force herself or her caregiving desire on others. She grew comfortable with the thought of having a different relationship with her grandchild than she planned. Her acceptance of the situation was a sign that Lois was learning about herself and an example of how one's purpose cannot be forced on others.

***Retirement changes priorities.*** Lois commended her friends for the joy they felt about spending time with grandkids or leisure activities such as playing golf, but she could not relate to that type of lifestyle. Perhaps not being able to spend time with her own grandchild caused her to shy away from friends who spoke about time with their grandchildren. Regardless, it seemed the enrichment of working in the church caused Lois, and her husband, to spend less time with old friends, and more time with those they felt shared similar values and purpose. The new friend group in the church allowed Lois to be more comfortable in sharing the fulfillment she gets in her faith community nursing role.

It seems from this story that friendships can be tied through commonalities and interests such as raising kids, having full time work, or through worship. When retirement opens up time and opportunities for pursuing deeper interests for people, some migrate to sharing more time with those of similar interests.

***Surviving narrow spaces.*** The experience that resonated the most with Lois at the Purpose Project involved examples of going through the narrow spaces in life. Narrow spaces have greatly impacted Lois' life. There was pain in her eyes and voice as she carefully described the loss she felt when the relationship with her son turned out to be different than she had hoped.

The move to live closer to her son was more involved than just simply relocating. Lois had to quit her management consulting job, her church, and help her husband adjust to his new job. Shortly after moving she returned to Minneapolis temporarily to care for her ailing father-in-law. With so much going on in a short amount of time, Lois maturely “stopped to look at the learning from these stressful situations.”

Like the story presented at the Purpose Project, Lois maintained faith that the narrow experience would pass, and life would brighten when she “came out on the other side.” Lois not

only used those learnings to help her patients through narrow spaces but she credited her faith and purpose to be an effective guide. If not for a series of transitions over a few years, Lois felt she would not have reflected enough, to find the faith community nursing role. Learning, faith, reflection, and purpose all played a role in Lois' journey to finding a job in the church that suited her need to feel fulfilled, needed and valued.

**Summary.** Lois claimed to have known her purpose in life from an early age, learning from several different experiences. Using meaning in life as a guide, Lois had grown, learned and evolved by caring for others during their time of need. When she experienced trying times, Lois found a way within herself to evaluate, endure and emerge with a new lens in which to view the situation in a positive way. While she felt valued by caring for others, Lois knew that her life was out of balance, which created anxiety for her. Knowing that a holistic approach to caregiving was essential to healing, Lois did not provide or allow that diversity of care to herself. It seemed she did not address her own physical, emotional and spiritual needs.

While being clear about what brings meaning to one's life can be useful, it might also prevent a person from maintaining balance. As in Lois' case the more she immersed herself in the caring of others, the less she took care of her own needs. While she struggled with spending all of her energy on purpose, and feeding her need to be needed, she seemed to not spend any time looking for purpose in other parts of her life, deeper within herself, or with a spouse who felt neglected.

Clearly what gets me up in the morning is that I have an obligation and desire to improve the quality of life of someone every day...so its serving, caring, demonstrating love. That is really who I am, that's what I am about. I kinda feel that is why I was put on earth...I think I would literally die if I didn't have purpose. Even as I get older, I think about being fully retired and getting up and having nothing on my agenda except cleaning my house and that just depresses me...I think it's really about at the end of your life looking back and saying I feel

good about why I was here. I feel like I made a difference. And that is the power of purpose.

#### **Case #6- Mary, “I failed YOUR definition of retirement”**

Mary retired as a school teacher and administrator at the age of fifty-eight and chose to stay employed in her district on a part-time level. Her husband, who is about the same age and was also a teacher, retired a few years before Mary, went back to work and had retired for the second time. Mary retired from full time work two years prior to this interview and took the Purpose Project with three friends shortly thereafter. Mary spent her non-working time in retirement learning new activities such as cooking, welding, knitting, weaving, playing piano as well growing her expertise in educational literacy by taking seminars and workshops.

It was with mixed emotions Mary said she took a part time position in her old school district after she retired. Because she spent her entire career in teaching and then administering literacy programs in her district, Mary said it seemed a shame for her to retire all of that experience. She considered her retirement a “job change with a pension.” Her decision to stay involved was also to maintain social relationships with other teachers. However, she was put off when other teachers commented on her decision to stay involved, albeit in a humorous manner, the year after she retired.

People would see me and say to me, ‘Hey I thought you retired’, and I’m like ‘Well yeah I have retired by but I’m doing (this new position).’ Then it would bother me to hear them say ‘Ha, Well you must have failed retirement then,’ and I would say ‘That’s interesting, I probably failed YOUR definition of retirement but not necessarily how I am seeing my definition of retirement.’

Although she grew up with parents who were teachers, Mary went to college thinking about doing something else for a career. However, Mary’s father encouraged her to get her teaching certificate in college as a “Plan B.” Mary spoke proudly of the literacy program she spearheaded and implemented in her district. The program’s success was another reason she had

a desire to stay engaged with the schools on some level in retirement. Mary spoke of some personal struggles with retirement in her first year, but things had gotten better for her in year two.

(Retirement) was a little concerning in a way as I looked at the transition...there is an identity piece and a social piece to it...I think (district issues and results) are becoming a little less important (to me) now that I am in my second year of retirement...it's a little less painful. You know I hear things that are being implemented in my department and it bothered me more last year, especially things I had worked on...but this year, just because of time...the distance has made it a little bit easier.

When Mary realized she was not as emotionally involved with district news in her second year of retirement, she actually started to feel relief to no longer be a part of it.

Now I am really glad I am not a part of (those issues). As I remember what a big task that is or was, and that the change process can be very difficult in a large school district...Sometimes I thought change should get easier, but it doesn't as the players change (over the years)...I gave it a good shot, I think I did good work, and now it's probably time for somebody else to take (the district issues) on.

While continuing work in the district suits Mary well for now, she is learning comfort with the other parts of her semi-retirement. Taking the purpose project was validating for Mary, especially the calling card exercise. The calling card exercise involves sorting through a deck of cards with simple phrases posted on them. The user eliminates cards until they find the five cards revealing phrases that represent personally fulfilling activities in life, such as "organizing things" or "comforting others."

The activity that helped me the most, or crystallized things for me was the calling cards...In different ways when I thought about retiring...I was kind of blocked. But when we did the calling card exercise it came out pretty clear to do some sort of teaching thing.

Although the calling card exercise helped Mary validate her continuation of working in the school district, she looked for something more fulfilling in life. Sometimes she resented her



decision to keep working, even part time. At the same time, she got anxious if she did not have at least one planned thing on the calendar each day.

As much as I enjoy the work that I do, sometimes I resent it as there is something else (social) I want to do, and I kind of think, I am retired so I should be able to do what I want to do, but I signed up for this work piece...so there is a little bit of a tug there.... I like to kind of have something scheduled, if I don't know if I have a few things scheduled it makes me a little anxious.

Mary found physical activity as a way to stay connected to friends while doing something for herself.

Health wise, I'm a little bit better about going and working out...that is also a social connection because I meet a friend in the morning...I really love that on Friday mornings there is a group of friends that I go on a walk with...I try to keep that time pretty sacred, and not let other things to impose on that.

### **Case analysis.**

*The retirement struggle.* In Minnesota public education, a teacher can retire and start their pension when their age added to the number of years in the teacher's union equal or surpass ninety. That provision gave Mary an unique opportunity to retire at the age of fifty-eight. Her husband also qualified for the "Rule of 90" a few years earlier, and he also returned to his school district to work part-time, while collecting a pension. While the decision to take advantage of the pension provision seemed like a "no-brainer" to Mary, she was anxious about what she would do with her time retiring at such a young age. One on hand, she wanted to stay involved with her beloved literacy program, mentoring younger teachers, and maintaining the social connection with her co-workers. On the other hand, Mary regretted having to go to work on the days she would rather be doing something of interest, like taking a new class.

Mary's direct comments indicated an awareness of her internal conflict but she seemed unaware of other manners in which her conflict played out. Her consternation for the comments

from fellow teachers about her failure of retirement could indicate a deeper internal struggle. Unsure of what full retirement would be like, Mary straddled the worlds of employment and retirement while she searched for the next meaningful opportunity. The balancing act allowed her to live a life of fun, freedom and learning while feeling needed and valued by the school district that provided those feelings to her for over thirty years. Faced with uncertainty about the future, Mary decided to phase into retirement.

If Mary had fully retired, at least from this district, might a new world of opportunity open up for her? Sundstrom, Burnham and Burnham's (2008) model posits that people need to relinquish the past before they can reflect and redefine their lives. Mary's decision to hold onto the familiarity of work might have held her back from finding the next "thing" she so desperately sought.

*What was Mary's purpose?* Mary said the calling card exercise at the Purpose Project validated her decision to be a teacher. As comforting as that was to Mary, it seemed curious that after thirty-two years in education, she needed validation that she was in the correct role all along. Another indicator of Mary's unclear purpose was her comment that the reason she continued in the district was to not retire her experience. What spoke louder was what she did not say. Mary did not express a passion about the work, or finding such great personal value in what she did that she just could not leave it behind.

Another sign of conflict of purpose was Mary's reflection throughout her career, about every five years, whether teaching was still the right work for her. This contemplation, in addition to data above, may demonstrate an uncertainty and lack of passion or meaning for what she called her life's work. Finally, although she was still working part-time Mary continued to ask herself if there is something more she should be doing in life.

Whether or not teaching was Mary's purpose, she continued the process of looking for something more meaningful in life. Her decision to take the Purpose Project was to get "unblocked" about retirement and she wanted to see what other people's plans were for their retirement transition. Although, she had the time to take a variety of different classes she was interested in, Mary continued to feel unfulfilled. While Mary said she enjoyed all of these new activities she still waited for something else to click that really brought her energy.

So what was Mary's purpose in life? She mentioned that having purpose is important to her and so the ongoing search for doing something meaningful made sense. However, she continued to look at activities, interests and part-time work for purpose without mention of searching or finding value through inward reflection. And yet, Mary started to recognize connections to things within herself.

*Learning and connecting with self.* It appeared that Mary was learning how to connect with herself and let go of the past. She embraced activities that were important to her as she strongly guarded the Friday morning walks and enjoyed making time to work out at the gym. Mary was anxious about losing friendships from the district, but learned that she can keep up relationships with other teaches and not talk about work as much anymore. Because the second year of retirement brought her a more relaxed reaction to district news, Mary was letting go of her deep involvement and need to be active in her old department. She now spoke of having a "successful career," like it was in the past, and allowed others to pick up the fight for making the difficult district changes.

The relevance of Mary's newly found relaxed attitude was her acknowledgement to herself that the work she already performed was valuable not only to the district, but also to her. She found and implemented academic programs that were meaningful and even if they did not

thrive without her continued involvement, Mary began being satisfied with the work she did. In fact, as time and self-reflection progressed Mary could learn ways to use her experience in academic programs for other applications.

Mary's reaction to comments on failing retirement caused her to reflect on her decision. This reflection brought great value to her when she realized that the journey of retirement was very personal. Her comments suggested that she had become more comfortable with her decision even though she had not found that next "thing" in retirement to feel fulfilled. That was a great learning for Mary that stemmed from a critical reaction to other's comments. She was accepting her journey as something she can personally drive without the outside influence or judgment of others.

**Summary.** From working with many retired people over the years, I realized that Mary's progression into retirement at such a young age brought unique circumstances. She had the energy and experience to continue in her job, but faced the ability to start her pension. This decision caused conflict for Mary as she weighed freedom and the pursuit of casual interests with the potential loss of her teacher friends, and leaving a career she knew she was good at. Rather than quitting her job completely, Mary chose the gradual approach. However, through the retirement transition Mary learned about connecting with herself, finding meaning in life, and letting go of the past. She said that she had yet to explore retirement with her husband, as they both had returned to work after retiring. Perhaps the dynamic of full retirement with a partner will have an impact on Mary's search for meaning in this next phase of life. Until then, her outward search for purpose continued while on her personal retirement journey.

#### **Case #7- Kate, "Tell me I'm wonderful"**

Kate took the purpose project in 2012 about a year after retirement from her job in education. She lived with her husband in St Paul, MN and they had no children. Kate spent a

great deal of time with her family and was the youngest of three sisters and one brother, all of whom lived within fifty miles of each other. Kate, in her early 60's, spent a considerable amount of time with her mother who died in 2010, a few months shy of age one hundred.

After her mother died, Kate felt there was “no next” for her. She had spent so much time with her mom over the years, not only caregiving but just hanging out like best friends. Despite Mom's old age and expected death, Kate described her pain as stemming from “not a bitter loss but a dramatic loss.” With mom gone, there were no more Chinese food dinners together, watching the news or even emptying mom's wastebaskets for her. Kate could not call mom on a whim and go the arboretum, drink cocktails, or just be together. Most importantly, mom was no longer there just to tell Kate “I think you are wonderful.”

In her lifetime Kate excelled at letting other people know how wonderful they were. She worked with students who were learning English as a second language so they could attend college. Kate prided herself in helping students through rough patches in life. She said she would, “Metaphorically scoop (the students) up- go underneath the worst student, the most recalcitrant, the most lost...and just push them up right through the ceiling.” Kate's life's work was about building others up the way her mother did for her.

Kate reflected about how she had learned where the boundaries of loving others needed to be, and how long it took for her to learn them.

I was wide open, I had absolutely no boundaries. That's just not healthy...but it came from a good place...Anyway, what I understood just came crystal clear to me that I was willing...that I would sell my soul to the devil for every one of those students to be happy and I thought ‘that's not right’. It just came crystal clear all of a sudden...The whole concept of boundaries had just become really clear.

The awareness of boundaries came, however, through several stops and starts in Kate's jobs. Twice Kate quit a position where she got too involved in the care of her students. She got

so wrapped up in the student's lives that she quit to regroup and recharge, and returned to a similar role with a fresh perspective of boundaries. She realized, "OK, if you can't be trusted with boundaries, you've got to understand yourself, you have to figure out how close you can come without going overboard." Kate recalled another very clear lesson she learned about boundaries when working in a university administration office.

I worked with a woman who taught me one of the most important lessons of my life. She was miserable, she loved her misery, she was ferociously miserable, ferociously crabby and we were locked in this office for two years...I learned such an important lesson because I would take this thing that she crabbed about away from her, and this thing and this thing all in the hopes that one day she would sit back and say, 'Oh, I'm happy.' And that day would never come. She loved her misery. It was a very important lesson and it was very satisfying to me to find out I could do the math.

Kate worked hard to keep the family together after her mom's death. Being the youngest of many siblings she had plenty of opportunity to express her love to her family. However, Kate learned that the loss of her mother made demonstrating her love a little more challenging. So challenging, in fact, that Kate quit her job to have more time to live her purpose.

It's all I really want is my family...I needed more free time so that I could spread out all that love I had for (my mom) to all kinds of other people because nobody else is centrally located...So I needed to make myself more available so that I could spend the love that I had been spending on my mom.

Kate sat with cousins or family members to provide respite care to more immediate relatives and also made herself available when anyone called for help. She also organized a family correspondence project, something she said she would not have had the time for if she were still working. Although Kate quit her job to create more time to love her family, she said she also had lost the energy to perform at work. Not wanting to be with her students scared  
Kate.

So anyway, I walked in (to her classroom) and I just knew I didn't have the heart...I felt heavy and I felt a kind of a loss, different from my mom. And I felt

entirely done with teaching...I didn't want to be in the room with the kids, the students. So that had never happened to me before and I was appalled and alarmed and kind of really vigilant to myself to say, 'OK you've got to go.'

Kate had a clean break from the classroom and enjoyed being retired. She said enthusiastically that she loved not having an alarm clock, being able to wear to comfy clothes anytime she wants, and going to the gym and Mass by herself. Workouts and going to church were newer activities for Kate, but something she had learned to do for herself, by herself. She claimed it is part of that life balance she had been learning about, which involved spending time on her own needs on occasion. Kate found her retirement very fulfilling.

I'm always exhausted at the end of my day. I'm ready to be horizontal and I'm happy and grateful every day- almost every day... There is nothing wrong in my life, I want for nothing and I'm grateful.

### **Case analysis.**

***Quitting work.*** While describing a love for what she did as her life's work, Kate had very little trouble "stepping away" when she no longer had passion for working with students. In order to quit for good, Kate took a hard look at her financial plan and determined she could "just get by" if she retired. I asked Kate if she would have still quit if she determined she did not have enough money saved. Kate admitted that would have caused her to "talk herself into staying at work for a while." What would make Kate quit something she really loved and step into a retirement with a marginally sound financial plan?

Kate really felt lost without her best friend, her mother. Kate said she did not receive the same type of love or support from her work and wanted to find a way to re-create the "active love" she was able to demonstrate for her mother. Saying that "active love" was her purpose in life, Kate felt that quitting her job was the only way to have enough time to "spread her love" throughout her family.

Her stories and emotion demonstrated that Kate had a deep relationship with her mother that included reciprocating love. Perhaps when her mother died Kate did not have anyone or anything to replenish the love that Kate gave to so many. Mom had always been there to love Kate back, and now with mom gone, she searched for others in need of caregiving where she could spend blocks of time visiting them.

In the end, one could question whether Kate truly ran out of energy to continue her work, or because she gave away so much love and care she was no longer able to replenish it the way her mom was always capable of doing.

*Out of balance.* Kate's story depicted a person with self-described boundless love for people that continually pulled her out of balance. Kate battled balance her whole life and even quit her job twice when she found she cared too deeply about her students and their problems. When her mother's age approached one-hundred Kate knew that mom's days on earth were numbered. Even with the expectation of her mom's death, Kate became so distraught she lost all her passion for her beloved students, and quit work for good.

Ironically, Kate spoke about the feeling of being in complete flow in life before her mother died. She felt with teaching, having a new husband in her life, and spending time with her mom and family, she had no other wants or needs. However when Mom died, everything fell out of balance. Kate lost her spunk, her spirit, her zest and her ways to express love. How could losing one element of a balanced life have such a dramatic impact?

Perhaps Kate's life was not in flow the way she thought. She said family and her husband added balance to her life but when her mom died, Kate instead turned to a friend to replace mom's love and requests to be told that "she was wonderful." While she loved her students and her work, she quit that as well when mom passed. It seemed that none of the factors



that Kate said provided balance were effective after her mom died. Was Kate's balance really just an exchange of love with only her mother?

*Search for new purpose.* After retiring, Kate spent a year working on projects such as a family correspondence project. When this activity did not quench her thirst for meaning in her life, Kate sought out the Purpose Project. Her participation in the workshop led to an "enjoyable experience" but Kate said she did not learn much. After the workshop she recalled a videotaped lecture she used with students that discussed the many ways that death disguised itself in life. As an example, she remembered the story of a couple having a baby that may bring the joy of new life to the parents. However, many new parents are not prepared to recognize the loss of a life that existed without the responsibility or freedom from caring for a child. Kate explained that the memory of the lecture reminded her that with each new beginning in life a death had occurred somewhere else. Kate said it was these type of thoughts that helped her decide to move on with her life without mom, and rebound from her depressed state.

While the recollection of the lecture may have opened Kate's eyes to looking for a new beginning, she reverted to the "active love" that she felt gave her life meaning. Turning to her family, Kate demonstrated her "active love" by making herself available to whoever called for help with caregiving or really anything they needed. She said, "I kind of exist in a place of ready (for a call), and then I move." Being available for others needs is undoubtedly a kind and considerate gesture, however, Kate's caregiving gestures continued to reflect her neglect for herself. Kate stated that during the caregiving weeks she need not worry about making any decisions for herself, but rather, can spend her day focused on the needs of her patient. While that selfless act is very kind, it demonstrated a continued lack of balance in life for Kate.

What caused this lack of balance for Kate? It seemed that if she was not giving all of her time, energy and love to others she was not happy. She spoke about losing herself by giving so much to her students that she had to back away from her job twice. It seemed that it was Kate who needed to give care to her mother, and now, to her family to the same extreme. Might there be a void of inner confidence, accepting of love from others, or lack of loving herself that caused her to be so far out of balance?

*Connecting with self.* Kate had started to find some simple things to do things for herself. She spoke unapologetically when she described personal workouts and walking to Mass by herself. These are two ways Kate learned to love herself. Also, coaching her friend to be the source of the “you are wonderful” comments, Kate set up a place of support she knew was needed. Kate also learned to set limits and expectations for herself when she decided to quit trying to convert the “crabby lady” at work, to being happy. Retirement had opened a few other small windows in Kate’s learning of doing things for herself. She sets no alarm, wears comfortable clothes, and allows herself to lounge when she has no caregiving assignments for the day. While the “demonstration of love” pulled Kate out of balance, she said she enjoyed it. Even though Kate looked for a new source of replenishing her active love, she was very clear that loving and caring for others is what made her happy.

**Summary.** Kate’s expression of love and family seemed very one sided. While she may have received love from those close to her, Kate’s desire to demonstrate her care for others clearly superseded any love she got in return. It was hard to determine if she was not open to being loved or if Kate just chose not to talk about it. When the only mentioned source of reciprocal love, her mom, died, Kate was lost and began a search for her “next” something in life. She let her Mom love her, but why not the rest of her family or husband? Regardless,

Kate's clarity in purpose kept her active as she continually sought out ways to love her family. She said she was very grateful and wanted for nothing in life. Was Kate's purpose a mask to hide deeper emotions or truly an expression of what she loved to do?

**Case #8- Ed, "When and who should help me find purpose?"**

After thirty years of teaching and coaching, Ed retired at the age of 55. Seven years later, in 2006, he saw an advertisement for the Purpose Project and decided to take the workshop out of pure curiosity. Ed had three young adult sons, and was married twice, but both wives had since died. He lived alone in a suburb of Minneapolis.

Spending a career in education, Ed said taking seminars such as the Purpose Project was nothing new to him. What was new for him, he said, were questions he developed at the workshop pertaining to where the learning of one's purpose should take place in society.

Why did it take so long for someone to ask me what my purpose is, you know, and where do we do this in society in the first place? Is it a job of our spiritual family or religious or...I taught school for thirty years and never once (did the concept of life purpose) come out...to me (finding purpose) should've been on the table way before I retired from what I was doing.

Ed admitted that he entered the Purpose Project suspicious of its objectives. He was suspicious of everyone he met in life. In fact, he said he was overly suspicious of my motives in this research and asked me several questions about the project before he was willing to participate. He discussed the Purpose Project objectives:

So I thought what's the purpose of this workshop anyway? Did (the leader of the Purpose Project) want to sell his books, and maybe get clients for his coaching? So I was there and I'm the kind of person that observes. And so I'm quiet. I'm suspicious.

While working sixty hours a week as a high school teacher and coach, Ed felt he was too busy to think about what was important in life besides work and family. Ed raised three teenage sons by himself after his second wife died..

I can think about things now. I don't have to get up and rush to work...As a coach, I would teach all day, jump on a bus and drive to a place an hour away, spend four hours coaching and then drive back. I would get home sometimes after midnight...I think the amount of work we do detracts us from building a better society...I think society is just too fast. Everything moves too fast. We don't pay attention to our lives, to what is happening in our world and politics.

Shortly after retirement, Ed worked with two hospitals to promote personal wellness such as smoking cessation, disease prevention, fitness and stress management. He enjoyed helping people better themselves and their health. Ed continued with programs to help "society's larger problems" such as combating poverty, high school dropouts, and climate change. His passion for work with such issues followed him when he relocated to a retirement community in Texas.

(After retirement) I moved to Texas for a while on the gulf coast, retired down there and I spent my own money working on a dropout prevention program in Corpus Christi, Texas. I spent my own money because I had these ideas that I thought would work. I believed in them.

Ed also enjoyed researching current topics and providing information and articles to related organizations. For example, when concussions for football players became a hot topic in 2013, Ed said he researched the cause and effect of sports related head injuries and gave information to the local high school athletic league. He was frustrated with the league's response. "So, I supply all the articles to the head guy up there and he receives them, looks at them, comments on them and says, 'Well, thank you very much. We'll look into this.'" While he enjoyed the work of digging into research on a subject, Ed felt that no one wanted to listen to him, besides his own family.

I think I can contribute (to society). What I've found, however, is that our society isn't...they aren't convinced that older people can contribute, especially young people...my kids do though. They say that I'm still alive and vibrant and I think I have opinions and I have knowledge.

Ed read books on the subject of purpose and meaning in life and how different societies emphasize or oppress people with its use. For example, he raved about Victor Frankl's book,

*Man's Search for Meaning*, and called Paulo Freire “brilliant” in his writing of *Pedagogy of the Oppressed*. Ed related Freire’s writing with the “Occupy Movement” he participated in a few years before the interview. (The Occupy Movement was an international protest of social and economic inequality).

(People still fall for oppression) it’s been around since slavery. When they got rid (of slavery) they had to change things so they invented money. And now money is our slave...I mean it’s just crazy how people are using money to control things and people. (Now money) controls rules and regulations. It’s outrageous...You don’t see it in the media but ground, grassroots movements are taking place. You know the Occupy was one of them. People say Occupy is dead, it isn’t dead...I’m not participating in it but stay in touch with what is going on...I think we are going to see some really major changes...(Most people) don’t know they can overthrow the norm, and that’s where I can feel I could serve a purpose, but it’s hard work.

Ed also felt that his generation, the Baby Boomers, were the most educated group in the history of society. However, he did not consider himself to be a mainstream retiree in that group as he wanted to continue to contribute to society and use his gifts and education.

Most of the people that retire that are my age, they’re just kind of playing golf and fishing ...and that’s the picture of retirement for them, whereas I don’t buy into that. I still feel I have the wisdom, I have talents, I have ambition.

While his ambition was strong, Ed continued to be frustrated with finding suitable outlets for his ideas, research and wisdom. He wondered why so many people would not listen to his him. He figured that since he himself was not able to think clearly about life until retirement, perhaps people who oppressed his ideas were just too busy in their lives to see his wisdom. Ed said he now sees life from a different perspective and is less patient with those that tell him that change takes a long time.

I mean (change is) a slow, slow process and you have to have patience. Shit, I may not be around next year. I’ve got to do this now. I have the stuff to do it. I just need somebody that’s gonna say go for it.

**Case analysis.**

*Two way suspicion street.* Ed spoke about being suspicious of people and wanting to know their motives before he participated in something. He later described how others often did not want to listen to his ideas. It appeared that Ed's approach to others did not allow for the same suspicions that he applied to them.

While Ed joked that at times he thought people judged his ideas to be "socialist" or "off the wall," he did not seem to change his approach to others. This led me to believe that Ed may not be aware of how he presented himself and his ideas. He said his ideas often fell on deaf ears even though he did a great deal of research on a topic that he felt would be of interest, such as the high school football concussion example. While the information may have been of value, it could have been the manner in which Ed delivered it that caused the rebuke.

*Outward Focused.* While Ed liked to read and learn it seemed that at times his information gathering was not satisfying unless he was able to share it with others. He enjoyed writing editorial articles in an attempt to educate others about what he believed and learned. However he expressed extreme frustration when he presented ideas to some that would not listen or accept them.

It appeared that Ed was a very well read and informed citizen. I got the impression that he truly wanted to help and educate people on issues such as poverty, oppression and anything political. In fact, he said his purpose was to educate others, but it brought him more frustration than fulfillment. It seemed Ed needed others' validation of his ideas to make him feel valued. The requirement of needing other people to help him feel that his work was meaningful was a challenge for Ed. Because other people often rejected his ideas, he felt frustrated and not fulfilled.

**Summary.** As a teacher, Ed spent decades with an audience of students in which to discuss his opinions, ideas and knowledge. Once retired, that natural audience disappeared, and Ed found himself with more time to think, research, and get involved for causes he believed in. However, rather than simply educating, Ed now wanted others to take action on his ideas and beliefs. When the action did not occur on a suitable timetable for Ed, he became frustrated and developed a deep disenchantment for society and many organizations.

When life slowed down, Ed lived more in the present and reflected on the value of purpose, well-being and the education of all parts of society. But, he did not want to wait for change as he realized that he had less future and more past in his life. Impatience fueled his frustration.

Ed brought up some excellent insights as to where, when and who should be responsible for helping people consider purpose in their life. When he started to reflect on his own purpose, Ed went to what he knew best, educating others. When his curiosity in learning and reading crossed into having more time and his desire to educate others, Ed felt empowered. He felt he had value that he could share with others and make a difference in society. But he struggled with knowing how to do it. His methods did not work to his satisfaction and he seemed to withdraw from trying rather than looking for new ways to educate and live his purpose.

**Case #9- Jackie, “I don’t need to be a psychologist to impact change”**

Referred to the Purpose Project workshop from a good friend, Jackie, age 58, talked her three college roommates into trying the daylong event with her. Jackie spent twenty-five years as a board certified psychologist in private practice but she quit her practice to assume roles as a caregiver, teacher and an informal psychologist role with a large local corporation. Married with an adult daughter, Jackie recalled her childhood experience as being expected to always do things for other people.

Growing up in a family of nine children, Jackie's parents made it clear that helping and serving others is just what people do. When Jackie's mother saw one of her children walking around the house without anything to do they were specifically told to "go make themselves useful." The family would sing together in hospitals, orphanages and were always doing some sort of service project, Jackie recalled.

Having a "service to others" mentality instilled in her throughout childhood, Jackie decided to become a psychologist. For twenty-five years Jackie helped patients identify and isolate what their problem was, and she insisted they make a decision whether they wanted to do something about the situation or not. Her belief was that change did not need to take years to happen, but rather it could be achieved quickly if people were willing to make the effort. Jackie said she became a psychologist to help people but after many successful years she became disenchanted with the evolving constraints of the profession.

It's like this was the psychology box (hands show small box) and it was like this is the life box (hands showing larger box) that I lived in and I felt like when I go in as a psychologist I had to get small again. And it's interesting because I was known as a psychologist who really moved people along.

Jackie's decision to leave the psychology profession actually hinged on two different factors. In addition to industry constraints to discuss alternative treatments with patients, Jackie became empowered to help people change and grow outside the walls of her psychologist office.

I think I stayed in the profession so long because I really didn't know how I could give (advice to people on change) without being a psychologist. And the other thing is that I was really, really good at it. So it's tough to walk away. I was making good money, I received accolades all over the place...I just knew I would know when the time was right to take on a new adventure, whatever it was going to be...

Attending a Landmark Forum workshop proved to be a pivotal event in Jackie's life. Landmark was a three day seminar designed to help people achieve some sort of breakthrough in



their life. It was through this experience that Jackie realized there were options to helping people the way she desired.

So it's not that I didn't have a good experience as a psychologist, but I really thought it was too restrictive....I didn't believe that the psychology profession had the power to help people change their lives...it just wasn't how I wanted to practice anymore...I did the Landmark Forum...Best thing I ever did...It altered significantly how I practiced in a very positive way, but I guess it helped me have the courage to (decide), I don't need to be a psychologist to impact change in people's lives.

After leaving her practice, Jackie moved to work for a year and a half as a staff psychologist for a major corporation. She left when her mother-in-law developed memory issues. With tears in her eyes, Jackie described a very close relationship with her mother-in-law and how much it meant to her to be able to leave all her jobs behind and just focus caregiving. It was a "no brainer decision" according to Jackie. After a year of enjoying a very memorable time together, her mother-in-law died having Sunday breakfast. Now Jackie had a sudden "what next" moment. She had quit all her jobs, but decided to rely on having purpose in her life to help decide on the next "thing."

Jackie said having clearness of purpose in life helped guide her comfortably through transitions. She followed up her career by working in schools with children who were slow to develop and then caregiving for grandkids.

I look at the professions I've chosen, you know, they're with people either that have disabilities or they're people in some of the worse times of their life. It's like I'm in the helping profession. And now, I'm babysitting grandchildren, so it's like I think it's just who I am.... And I really believe that in any situation, I can always do something, always, and I'm the driver.

What Jackie learned was not to have worries about things not working out. She said she always believed in synchronicity between events in her life and learned that having a clear

purpose helped ease the transition between roles and opportunities. She is also learning how to slow down and live her life more on purpose.

But I'd say if there's anything that's grown for me and in things like the Purpose Project that attracted me is that I wanted to learn how to live according to that on a day-to-day basis. So the anxieties that I had at twenty and thirty and forty I just don't have anymore...I think it's really easy for me to get going really fast and not be conscious.

However, living on purpose, with a purpose also brought Jackie some challenges. Trying to find balance or a quiet place in life for herself once in a while, rather than making sure others needs are being met, was hard for Jackie.

I believe that our gifts are also our curse...I believe that there are just sometimes where it's like I don't want to be the one who's...(worried about), I noticed Suzie Q over there isn't contributing...I'd like to hear (what she) has to say. So I can't turn it off. So I guess sometimes that's difficult.

With that curse however came a very strong and positive outlook for the future for Jackie. She confidently concluded with a statement that emphatically declared that the best is yet to come for her. There's much more "being of service" in her future where she can roll up her sleeves and not stop until the work is done.

I feel like the power I have today to make a difference is nothing, it's much better than it was back here (in the past), and the power I have is nothing compared to what it will be in the future...That I will be a healthy hundred old woman making a difference, whatever that will be.

### **Case analysis.**

***Taking action.*** While stating that she learned to live her life on a more day to day basis, Jackie continued to hold a take action mentality. Whether pressing patients or herself to initiate change, Jackie's life emulated what her parents instilled in her, not being comfortable by staying idle. She said she rolled up her sleeves and never left a situation until all the work was completed.

Stating that she never had much of a plan in life, Jackie found the next role, activity or situation to keep herself busy and be of service to others. She might have been successful in moving to another fulfilling activity because of her commitment to always be moving forward. However, perhaps she was able to move to the next role because she understood herself so well, and what she found to be meaningful in life. Knowing what to look for in a role to ensure it was personally fulfilling may have contributed to Jackie's ability to move forward.

Jackie spoke about few transitions in her life until she left her psychology practice. Once she learned that being of service to others could be executed in many other ways, she quickly moved from one role to another. As a caregiver, teacher, babysitter and consultant Jackie's world opened up to other activities she found fulfilling.

***Walking away.*** Spending twenty-five years in a successful role, and walking away at a young retirement age without looking back, demonstrated a maturity, growth and clarity of what Jackie found meaningful in her life. She entered the profession to help people, but left when she felt that the constraints of the field required her to climb into "a little box" with limited acceptable methods of treatment. Jackie felt this constraint for some time but eventually had a breakthrough, through the help of the Landmark Forum, that she could find fulfillment other ways in life. While she could not pinpoint the actual activity or exercise at Landmark that specifically unveiled this vision, Jackie did realize that just taking a few days to think about her life really helped her. She created a vision of what to do, and the confidence to overcome the anxiety to actually do it. So she left her practice and went to work for a client who provided many patients to her.

While Jackie did not comment on the economic impact of this decision, she later spoke about the financial stability her husband's business provided. Assuming that caregiving,

babysitting and teaching part time in an urban school district paid less than her psychology professions, Jackie might have been afforded the opportunity to pursue more passionate work because of her husband's income. Regardless, income seemed to not play a part in Jackie's decisions to move from psychology to roles that were more fulfilling. In her instance, purpose in life seemed to be more important than money.

*Losing balance.* Other than a mutually loving relationship with her mother-in-law, Jackie spoke little about how other people do things for her. It seemed that while she attempted to live life on a day to day basis, Jackie continued to strive to stay in active caregiving roles. Stating she felt her purpose was a bit of a curse and that she continually felt out of balance, Jackie might have been victim to what gave her life meaning. She needed to be active in being of service and could not sit idle if she felt someone was not being included in a conversation, activity or meeting. Not being able to turn off her need to be inclusive with others, Jackie might be so focused externally that she is not taking care of her own needs. As Jackie dealt with her self-described curse in purpose, she tearfully described her burning internal desire to make a difference in the world. It seemed from her stories that Jackie had made a considerable difference in people's lives, from many different roles and relationships, but she continued to look for more. Jackie even felt empowered that as she aged, and her purpose in life grew, she would do even more than she had in the past. While she spoke about being more present in life and slowing down, she was excited about what the future would hold and what impact she could make. By looking into the future for even more purposeful ways to live her life, will Jackie ever be content in life?

**Summary.** Jackie embraced life, relationships and her ability to be of service to others. She learned about herself when she slowed her pace to reflect and realized that her journey was not all about psychology. When she did take time for herself, such as attending the Landmark Forum, Jackie's results were life changing. Her story indicated that leaving a successful practice stemmed from the wisdom and insight to what was behind her desire to be a psychologist all along. When simply "helping people change" was identified as purpose, Jackie started moving through roles with a greater understanding of herself. She took charge of her life just like she demanded of her patients. With this new vision, her anxiety subsided and she whizzed through a retirement transition knowing that the opportunities for her were endless. Feeling that there is "always something she can do" for someone else, Jackie failed to run out of ways to make herself useful, the way her mother told her.

**Case #10- Dewey, "A clean finish"**

In his fourth year of retirement, Dewey continued to look for "that thing" to latch on to. He retired from a leadership rank in the United States Military at the age of 57 and lived in suburban Minneapolis with his wife, who continued to work. While his wife planned to join him in retirement in a few years, Dewey enjoyed his "solo retirement," for now, as he expected his wife may want him to try some activities he had no interest in. Dewey had no children and said he enjoyed his early morning workouts in retirement followed by a day with few planned activities.

In 2005, Dewey began to contemplate retirement as changes to military operations throughout the country indicated his base could close at any time. Dewey constructed a list of criteria that would be critical for him to follow to be comfortable enough to retire. He wanted a strong financial plan, a clean break from his military position with no lingering commitments,

and to feel like he was “going out on top.” To Dewey, retiring on top meant high esteem, status and strong friendships.

Dewey’s “plan” for himself in retirement was “not to plan,” as he wanted to spend five years learning about himself, hearing about what others did in retirement and design a life that was completely different than his military career.

Part of what I wanted to do was have a nice clean finish and I did not want anything related to what I did in my adult life and my adult career into retirement...I worked for (the US Military) and there are certain things in the arena of leadership, training, development, operations...which would translate into the civilian sector but what I just told myself – to me, is that’s not what I wanted to do.

Evaluating and creating a financial plan was critical to Dewey as he wanted to not have to go back to work to any extent once he retired. He moved his investment portfolio to a more conservative strategy in 2005, and, ironically, benefitted from the economic downturn in 2008 and 2009. Dewey was able to secure his finances with this strategy and also move money back into the stock market after its tumble in 2008, resulting in a nice profit heading into retirement. Dewey said while he was in a good position to pull the trigger on retirement in 2009, he kept a low profile about celebrating his newly gained freedom as so many Americans were hurting during that time. He explained that had he not started moving his investments to a more conservative portfolio early, he would have not been able to retire when he wanted to like so many others whose investments suffered a significant decrease in value.

Shortly after leaving the military, Dewey destroyed the documents, certificates and records of his military career. He calmly emphasized that removing medals, ribbons and plaques from the wall of his home office was really a matter of practically, and not symbolic of anything such as a desire to extinguish his military career.

I didn't need to have them any longer...It was time to go ahead and that was an era that had ended...Down in the basement I have my own area, it's a cedar closet for all my uniforms, all my stuff. So I went through that...gave it to Goodwill or disabled vets and got rid of all that stuff too...It was moving forward and no need to keep them. You'd have to clean that eventually... It wasn't deliberate or necessary, it was just one thing that I said I'm going to do.

Dewey's plan not to plan in retirement was centered on a decision to not commit to anything for a while. Having spent thirty years developing strategic military plans as part of his job, Dewey now wanted to take time just to learn. Learning for Dewey involved reading, talking to other people planning retirement, and self-reflecting how choices can affect his life. "At one time in history we didn't have the ability to choose... You can choose to believe, you can choose not to believe and that's a wonderful thing in our society," Dewey said.

One of Dewey's choices was the development of a personal philosophy. He explained that in the military a person adopts a certain moral, ethical and legal code. That code became part of who he was and not something he turned on only when put his uniform on. While Dewey was not yet clear on what personal philosophy he wanted for himself, he had taken the last four years to study it. In addition to sitting in five different types of workshops he spoke at a local university about the value of a liberal arts degree. He said the speaking engagement allowed him time to reflect on his decisions, and how he used his education on his life's journey.

Dewey read a book by Charles Taylor called *A Secular Age* which helped him realize the number of choices he would be making for himself in retirement. Several times Dewey referenced his interest in listening to other people discuss their retirement plans and experience.

I've been to five of them (workshops), just to hear other people's story. That was probably the best outcome, I thought, and then also people's questions...by doing that and participating in those seminars ...you had the opportunity to kind of...rank yourself to your peers—where are you at or the questions you have as opposed to what they're dealing with, what are their concerns, what are their priorities, what are their unknowns? And that can give you a little feedback...So that was kind of comforting. I think I always had confidence in myself in the preparation that I had done...Retirement is so personal, it really is.

While taking time to reflect was important to him, Dewey admitted to having an unsettled feeling with the realization he was not sure what he wanted to do in retirement.

I thought my parents would enjoy a little bit more visits etc. Not so much...I thought when I retired I would do some short-term investing (like) individual stocks....and that didn't turn out to be true...I think I'm near the point of saying OK, it's time to make some decisions...I have yet to find an area, though, that kind of ignites (me).

### **Case analysis.**

*Heading into the unknown, he started with what he knew.* Leaving a long career in the military, the creation of a strategic plan was nothing new to Dewey, but this time he constructed it for himself. Wise enough to know what he did not know about retiring, Dewey relied on his planning strength. Although parts of each planning step blended together to some degree, a very logical sequence emerged for him.

Dewey's plan included to "go out on top" and to have a "clean break" from his command position. While he explained the reasons for both, I sense that he also wanted no personal regrets about retiring as later in the interview Dewey referred to colleagues who left their positions and had regrets about quitting too early. Being adamant about leaving his military position in good order, Dewey said he had never looked back.

He strategically evaluated his financial situation and felt comfortable that there would be no surprises that would require him to return to work in any capacity. Dewey wanted five years to reflect and gather information. I suspect that his military training and decision making often involved gathering and analyzing data before taking action. Similarly, Dewey's plan involved asking questions of others in the retirement transition, as well as reading, taking workshops and self-reflection. Again, by not knowing exactly what to expect in retirement, Dewey gathered and



analyzed data before making a decision, which was a familiar approach and comfortable process for him.

*Where to look for purpose?* While he enjoyed his workshop experiences, including the Purpose Project, Dewey found that words like purpose, meaning and passion in life were still pretty “fuzzy” to him. While he thought he was doing the right thing by reading and taking workshops, he either simply had not found what he was looking for, or with the purpose definition still fuzzy to him, perhaps he did not know where to look. If a person is unsure of what to look for, how might they find it?

Dewey settled on the development of a personal philosophy. Now that the military shroud had been shed, Dewey could reflect in a deeper way what he personally believed in. A book that assisted Dewey on his journey was *A Secular Age* by Charles Taylor. He learned that throughout history people did not always have the ability to choose their path in life. As people developed more freedom they had to learn how to make choices for themselves. Now that Dewey felt he had more choice in his life’s direction, he first wanted to learn how others had made decisions.

Taking workshops was more about listening to others questions and stories than about finding something specific for himself, Dewey explained. His “reconnaissance” mission revealed that many other people at these events struggled with what their “purpose in life” was so Dewey felt validated and comforted by that fact. Interesting to note that while Dewey was slightly anxious about his own path, he found comfort in knowing that his situation was not unlike many others. This could be why he elected to keep his life in a state of limbo while he continued on his search for what he wanted to do next.

While Dewey continued on his path of uncertainty, he sampled a few things he thought would feel meaningful such as volunteering and speaking at his alma mater. When those

activities did not move Dewey to want to pursue them in a deeper way, he continued to stay uncommitted. His story showed no attempts to take a risk with committing to something where he could possibly find a more meaningful experience by becoming more engaged with it. It seemed evident that Dewey's tactic was to "window shop" and perhaps to briefly try something on from time to time. This approach had yet to yield a satisfactory result.

*Adjusting to an unstructured life.* Taking time to reflect on himself, Dewey provided himself time to adjust to an entirely new way of life. As a ranking military officer, Dewey was accustomed to carrying two cell phones, planning budgets and strategies for his unit, managing a number of people and being available at all time for secure communications from his commander and others. He desired to leave this structured, planned way of living in the past, and transition to a very unstructured life in retirement. He said he desired a "fresh horizon."

Committing to his usual early morning workouts provided Dewey the start of the day structure he was accustomed to. This activity anchored him to something that was familiar and important. But now having an entirely unplanned day was something very new to Dewey, and he did not have much experience in navigating this part of life. While he found enough to do to stay busy, he continued to struggle with finding anything meaningful to do.

Dewey's situation exemplified a person moving into the retirement phase of life without any reference point of what they found enjoyable or fulfilling during their working career. This transition and lack of structure led to few results for Dewey. When I asked what he had learned about himself during the last four years, he paused for an uncomfortable amount of time and then asked to pass on the question. I then asked if he had any ideas of what had brought at least a sense of purpose to his life. Dewey pulled out a notebook and explained he "thought he had a few things written down" about that. He was unsure. Being in an unstructured state of life had

been a challenge to a person who had not experienced such a state of being in the past. Dewey continued to search for something meaningful.

*Reflecting inward.* Leaving a career of recognition, responsibility and structure, Dewey chose a new path of inner reflection. He seemed to not revel in his leadership role of the past but strove to shed a label of military rank to just being himself. While he made no attempt to dispel the morals and values of the United States Military, he wanted to take time to think though what he believed in.

Dewey found comfort in his decisions in life explaining that not having children or belonging to a subscribed religion was right for him, even if society might think differently. Dewey stated that love, charity and thoughtfulness comes from within, and is more meaningful when given in a way that is not rooted in religion or pressure from society. The discovery that he was comfortable living his life in a way that need not be directed by societal norms could be the foundation for finding meaning in his life. He was learning about himself.

Dewey's commitment to himself and his own path in retirement was reflected in the decisions he anticipated having to make when his wife retired. While Dewey attempted to discuss retirement plans with his partner, she was not ready to even start the retirement conversation. He continued to focus on his own journey knowing that when the time was right, his wife would join him and a new retirement path might be established. However, he suspected that his wife will want to do some things, such as travel, that Dewey had no interest in. He already had seen most of the world and while he would support his wife in her desires, he likely would not accompany her on many trips. Like an experienced military officer, he anticipated that conversation with his wife and how he would handle it.

I felt Dewey's opportunity to experience retirement without his wife was important. While he might find enjoyment in spending more quality time with her when she joins him in retirement, he had taken advantage of the chance to learn more about himself and what was important to his life. While the activities of retirement may provide fulfillment for some, Dewey really wanted time to re-invent himself, and his life, before he committed to anything, especially before his wife retired as well.

*Letting go.* Not only was Dewey able to let go of his career, it was important for him to do so. Dewey spoke often of the importance of a clean break which included everything from "going out on top," to setting aside any artifact or document from his decorated military career. The practicality of cleaning out his uniform closet to make room for something new, perfectly illustrated Dewey's intention of shedding his career to create room for a new but yet to be determined endeavor.

Letting a career die to allow for a new beginning is a perfect example of Bridge's (2009) model. While Dewey said he felt little grief about moving away from his career, he stated that he was still searching for that new beginning. In Bridge's "Neutral Zone", a person holds themselves in a state of limbo which allows them time to accept the loss of something as they search for something new to start. Dewey demonstrated maturity and confidence in holding himself in a state of limbo even though it was a bit unsettling to him. He was letting his career die, so he had room for the next "thing" in life.

**Summary.** Agreeing to do an interview for a student's dissertation project was a perfect example of Dewey's desire to not make a huge commitment in retirement, but to continue to be of service to others. Answering questions also allowed himself another chance to self-reflect and ask questions about what others were doing in retirement. To prepare for the interview with me,

Dewey spent a couple days reviewing his notes from the Purpose Project and some of the other workshops in which he participated. He confided that while he was only four years into the five year reconnaissance plan, he felt ready to find that activity or “thing” to attach to. And yet, he stayed committed to not committing to something unless he was sure it would be fulfilling.

As Dewey’s story continued to unfold, he remained a perfect example of a person transitioning into retirement without a clear idea of what they want to do. Dewey’s journey involved searching inside of himself for values and meaning, while learning about living a life without commitment. While Dewey spent time learning about himself, he was still stuck in the neutral zone. His experience offered the question of whether some people are just not able to ascertain what they find fulfilling in life, even though they are diligently searching.

#### **Case #11- Luda, “I don’t know where I belong”**

Never married and without children, Luda worked as a nurse in the public health industry. Luda, age 63, took the Purpose Project about eight years before the interview. She considered herself not yet retired but was looking for work after being laid off from her last job. Luda felt she never fit in. This feeling was confusing and hurtful for her while growing up, but Luda learned to accept and understand herself for whom she was. She realized her life experience had been different from most people but she considered herself unique and not unusual.

I know myself a lot better than I did when I was 20 years old and probably a lot better than when I was a 40 year old...It’s not just knowing myself but accepting myself the way I am. It’s that piece of, galldarnit, I’ve tried hard to please people all my life, and maybe I didn’t please them as much I could have, but I am okay with that, and I am okay the way I am.

Raised in various foster homes growing up, Luda never felt like she belonged in a family. Saying she frequently “shot her mouth off,” Luda often found herself in isolation from other kids for punishment. The constant reprimands made her feel that something was wrong with her.

Later in life, Luda experienced verbal altercations with bosses and superiors over the years, and often felt she never really fit in her career field either. But as time wore on, Luda came to understand, accept and embrace herself. She said she constantly worked on herself, and adjusted her view of how she might fit into her chosen career.

My work became a match for my personality as I kept tweaking it and tweaking it until I found my comfort zone as to what my natural strengths and abilities were. (Taking the Purpose Project workshop) was a catalyst to figure out where I was in my career field...it helped me tweak my lens a little bit and look at my career to see what was good about it.

While Luda was learning more about herself and what she enjoyed about her career field, she developed insight into the difference between the work she did and the place she was doing it.

I was working at (a government run health organization) and I was feeling very fatigued with all the bureaucracy. I concluded that the work was purposeful to me and it was the work environment that was so difficult for me. I had to find ways to keep myself sane, figure out what was good about it, and stay away from the icky bureaucracy part of it. So it was an adjustment.

In addition to altering her perspective, Luda learned how to morph the way she worked and interacted with people.

What I've learned about myself is what I take in from the larger culture is a contradiction to how I present myself...I am very candid...It's valued by my peers and coworkers, but not as much by managers...I had one manager that understood that about me, so she really valued me...(I've changed the way I ask questions by saying) 'it's just an idea, I'm not saying what we are doing is wrong or what we are doing isn't right.' So I learned how to couch things like that...Sometimes now I ask people if I can say something...so I couch (my opinions) better...more gracefully.

In nursing school, Luda said she had a very eye opening experience on an overnight shift at the hospital. She worked with a woman giving birth and later that night sat vigil with a woman whose father was dying. Seeing such a stark contrast in the pandemonium of birth and the peacefulness of death, Luda later decided to work at a hospice care facility. She said she can

relate to people who are dying as it is a very individual time. People are reflective and look to come to terms with the decisions they made in life. She felt that people in a hospice have time to think, where most people do not take time to think during their busy lives.

Hospice appeals to me because it's about the patient...it's the last experience of a person...People when they are dying become more self-reflective. I think it's a time for people to heal. Heal themselves, heal relationships, their relationship with their personal god, with their family. So it's a very rich time.

Looking forward Luda wanted to find a place to live with others. While having a partner would be of interest, Luda worried that "negotiating on a daily basis" with another person in her space might be a bit much for her. Rather, finding a more communal living setting would be ideal she said. She enjoyed living alone now but just found it rather lonely.

Luda reflected on how she saw herself versus how she felt society judges people. She felt her views do not align with how most of the American culture feels a person should live their life. Instead, Luda felt people should spend time to understand themselves and worry less about what other people think.

Culture says get the most education you can get, get a job, get all the money you can and buy the biggest car and the biggest house. You sure don't have to buy into those things but that certainly is the message that is out there.

Reflecting on her own life, Luda needed to take time to shed society's expectations of her and decide for herself what was important.

And for my generation of woman, I've always had kind of this bind between I've never been married, I've never had children. So if I devoted myself to my career, why aren't I rich and famous in my career? It has been a rub. What is success then? What do you find personally as your success?...My success? Becoming a better person. To be as conscious and aware as I can be, to be a kind person, to be empathetic, and not to do harm to others.

As Luda reflected on how living with a purpose affected her life, she scoffed at all the attention around what a purpose in life really is. At the same time, she thought about what she

found fulfilling in life. For her, she worked on letting go of expectations and looked forward to making connections with more people. She also realized that in making connections a person will ultimately receive feedback from others. Luda considered feedback as a gift.

If people give you feedback it is a gift. It means you are approachable...I'm perplexed and turned off by all of this purpose stuff...We are manufacturing it. It's a bill of goods. The piece around my spiritual resonance is connection. Am I connecting with others in a positive way...I'm dealing with fulfillment right now. I never had kids, don't have grandkids, so this is why I am doing more work in hospice. I want that connection with people.

### **Case analysis.**

*Connecting with others.* Luda admitted to never having a deep connection with people in her life. Spending her early years in foster homes and never being married she had very little family. In her workplace, Luda said she often did not fit in and sometimes argued with her co-workers or superiors. She considered herself an outsider to society both physically and ideologically. It would seem from these experiences that Luda would not be able to connect with people but that was not the case. Luda embraced the holistic experience of dying. She connected with families of the dying in hospice and felt valued when she could help a patient feel more comfortable.

So what allowed Luda the ability to connect with people in a hospice setting but not others? It seemed that Luda connected with those who she understood. Luda did not see herself connected to society as she did not share the same views she felt society held. However, having gone through a period of reflection and healing herself, Luda appeared to understand the reflection process a dying person went through.

*Connecting with self.* Luda had questions about life that she carefully processed. It took time and reflection for Luda to realize why she would get in trouble asking questions when she felt she was only seeking to understand. When she recognized how her questions were being



received, she changed her approach. Reflection also helped Luda figure out how to function at her place of work.

It appeared that Luda really understood herself. Her thoughtfulness and reflection allowed her the awareness to break situations into parts and examine them individually. She thought about what each part meant to her and then looked at the big picture to see how that affected her as well. Her awareness allowed her to decide how to tweak, ignore, or directly address whatever situation she faced. For example, when she was upset at her job she took time to realize that she enjoyed the work but just did not like the organization. With that insight, she was able to make adjustments to stay employed doing something she liked, and not quit her job because she did not care for one component.

*Connecting with fulfillment.* Luda's reflection allowed her to create a definition of purpose and fulfillment that made sense to her. She saw a difference between feeling fulfilled and living on purpose. Luda measured her life against what she felt society wanted her to value in being married, raising a family or advancing in a career. During this measurement, Luda defined for herself what fulfillment looked and felt like. Once she defined that being a conscious, aware person was important to her, she shed the perceived expectations society had for her and worked on being an even better person.

Luda desired more connections with people. She embraced her work in the hospice but began to seek out living arrangements where she could create connections with others. Knowing herself well, she did not feel that having a partner was the solution, but rather having various others to socialize with.

**Summary.** Although Luda did not subscribe to the purpose part of the Purpose Project, she used the workshop to examine her role and relationships at work. She learned to embrace

her role and not worry if she was not creating a relationship with others or an attachment to the organization. At the same time, Luda's journey in learning what was fulfilling for her helped her learn more about herself through reflection and analysis. As she became more comfortable with her own beliefs and who she was, she healed some of the hurt she felt from her childhood, former employers, and what she thought society wanted her to value in life. Finding ways to feel fulfilled helped Luda let go of her grief from the past and transform into a more aware person, something she really valued.

**Case #12- Debbie, "Will you hold my faith for me?"**

Debbie, age 55, took the Purpose Project with her husband four years prior to the interview. Not yet retired, she worked in several roles with international education and marriage and family counseling for immigrants. Debbie was fired from her last position several years before the interview and was still not working full time. Debbie was a caregiver for several family members and planned to set up a business helping seniors plan for health care needs later in their lives. Debbie thoroughly enjoyed participating in different types of workshops over the years that focus on purpose, meaning, guided imagery and life coaching. Since the Purpose Project workshop, Debbie worked individually with a life coach as she preferred a more personal setting and attention to focus on what she felt is important in life.

Calling her life filled more with passion than purpose, Debbie enjoyed her work and volunteer activities. When one job or project ended, it was easy for her to find something new. Debbie said that knowing what she enjoyed and was passionate about allowed her to always find a new door to open. Whether it was helping refugees find work, caregiving for family members, or creating workshops for those that are "marginalized by society," Debbie continually discovered opportunities to help people in ways that was meaningful for her. Throughout the interview, Debbie spoke quietly but with conviction that she valued doing meaningful work in

connecting people to information, programs and to each other. She stated during various parts of the interview:

- “Meaning in life is really important to me”
- “My passion is where I used to work in international education”
- “I really enjoyed getting to know and working with people of other cultures; that’s a passion of mine”
- “I think (feeling fulfilled in life) is extremely important. I feel very fulfilled; I’ve gotten to do a lot of things I like.”

Debbie’s passion, however, often involved working within programs that relied on funding sources which were not always consistent or stable. Therefore, Debbie learned to keep looking for the next door to open when funding dried up on her current project. Over time, constantly looking for new work became a challenge for her.

I’ve been laid off from a lot of jobs and I have to keep reinventing my life and my career...When you experience a deep loss, like your job, it’s often (like losing) your identity. So in my job losses that has been hard and I go through a grieving and depression, and I have to go through that before I come out on the other side. Once I was so depressed I told my sister “I’ve kinda lost my faith so I want you to hold it for me.” So that was great to know that someone else was going to carry it for me for a while.

With frequent job changes, Debbie also felt pressured when she could not contribute to the family’s income. She spoke about the support she received from her husband and the fact that a recent raise for him materially eased that pressure on her. Although she always put financial pressure on herself, Debbie spoke about being grateful for her husband’s job and income which allowed her to pursue work about which she was passionate but that might not pay very much.

At times Debbie held what she called well-paying jobs, but she did not care for the type of work she was doing. The jobs were often administrative in nature and not aligned with

Debbie's purpose, which is connecting people. Therefore, she felt torn between getting paid well and doing work about which she was passionate.

Between jobs Debbie served as a caregiver for her mother, father, mother-in-law and others in the family. While she enjoyed being able to help her parents, she found the personal assistance demanding and time consuming. Eventually Debbie had to ask for a small monthly payment from these family members as compensation. She said getting paid was not really needed for income but rather to maintain her "self-worth."

Despite the time and energy demands, Debbie remained calm and focused on continuing to pursue her passions in life. Part of her strength and support came not from her family, but rather from friends and colleagues that shared a purpose similar to Debbie's. While she preferred to have more family support, she said it just was not there. Debbie suggested that her family may not really understand her projects, so that is why they did not support her more.

As she looked forward, Debbie planned ways to keep working with her passion as she aged.

Watching people age is a humbling experience I think because they have to deal with so many losses...I am teaching myself to carry my passions with me...so I can adjust if I need to use a walker or something. What can I do to keep meaning in my life? That's my goal for myself.

### **Case analysis.**

*Establishing deep relationships with people.* Debbie was very purposeful in creating trusting, deep relationships with people as part of her life's work. When she spoke about her work with refugees learning how to navigate living in the United States, Debbie's eyes lit up. She smiled broadly when she said that many refugees told her that she was the only person they trusted. Debbie said that meant a lot to her. She also spoke about her fifteen year role in

international education where she provided marriage and family counseling to people of other cultures. That was a very satisfying period in her life she said.

Debbie's expression turned from solemn to joyful when she described her ability to assess a person's interests and introducing them to someone she knows with a similar interest. This was an example of her ability to connect with people and connect them with others. Debbie's connection with people sounded very one sided, however. While Debbie rattled off story after story about ways she has helped people either in organizations or in her family, she spoke little about what people have done for her. She found satisfaction in "helping people tap into their own passion," and being held out as a significant help for those in need. However, Debbie said she valued relationships the most. If relationships, especially deep relationships, are about people knowing and caring for each other, Debbie spoke little about what she received from relationships. Seeking out a personal life coach to rebuild her confidence supported my theory that her personal relationships might not provide her the support she needed through her painful job changes.

Debbie's search for deepness could also be evaluated with her relationships with family and her husband. Debbie was proud of the fact that her husband's reaction to the Purpose Project workshop was positive and that he learned his purpose was about "showing up" for others. Debbie gave several examples of how her husband had shown up to support her. However, the energy in her voice immediately dissipated when she described the lack of support she felt from her husband and family in regards to her elder care business plans. This example could also support a lack of reciprocity in what Debbie felt she gave to family versus what she received.

***Purpose with a price.*** In addition to conflict with relationships, Debbie described the hurt she experienced in other parts of her life. For example, Debbie described a job that paid

well but did not feel meaningful to her. For many years Debbie felt conflicted on whether to keep this job to fulfill her sense that she should contribute to the family income. This demonstrated a struggle for Debbie between balancing meaningful work and financial need.

However, Debbie also struggled with caregiving without being paid. She said that the caregiving was fulfilling for her, but obviously not enough to feel valued. Her request for payment suggested that caregiving, at least for family members, might not contribute to what gave her life purpose.

When Debbie did find purposeful work for pay, she often got laid off. Debbie's decision to keep moving to the next purposeful job, with risk of getting laid off again, demonstrated her commitment to meaningful work regardless of the challenges. Over time, her commitment and determination wore her confidence down. Debbie became so distraught she needed to hand her faith to her sister to hold for her while she re-built her confidence.

Debbie's story illustrated the commitment of a person to do meaningful work regardless of the personal cost. In this instance, might Debbie be so determined to live a purpose filled life that she lost vision of what she really found valuable. She stated she loved being able to connect people. Might there be other ways for Debbie to live her purpose, or is her purpose search really about looking for ways of feeling valued?

***Feeling valued.*** Many of Debbie's stories described a need to be valued. Debbie felt validated by the refugees who provided feedback that she was trusted and valued. She needed compensation for caregiving to her family members and did not feel like they were behind her new business venture. Debbie said that her well-paying job did not make her feel that her work was very important. The lack of consistency in what Debbie needed to feel fulfilled could

suggest another example in her lack of clarity between living true purpose in life and feeling valued.

**Summary.** Debbie wanted to connect people, and connect with people, to help them get through challenges in life. However, her well-meaning work left her feeling frustrated by layoffs, and feeling unappreciated by family. Therefore, she sought support from friends for her new business venture. Could Debbie's story suggest an example of being too focused on meaning and purpose? Debbie seemed so focused on helping others that her own needs were not being met. She valued herself as being a caregiver for others and yet she needed to get paid at times to feel self-worth. Her story also illustrated a case of the tradeoff between working for money and working for purpose. Overall, Debbie was a compassionate, considerate individual who held onto what she felt passionate about, often at her own expense, for the sake of others.

### **Case #13- José, "I'm not a Don...yet"**

José Guerra grew up in New York in what he called Puerto Rican Harlem. He married and moved to Minnesota where he resided in an aging farm house forty miles outside of the Twin Cities. José, in his early 60's, retired two years prior to the interview from a tenured teaching position at a local university. He now spends time writing, consulting and restoring the farm land to native prairie. José's wife still worked so he had the home to himself most workdays.

Blind in one eye until the age of 19, José "saw" a whole new world after surgery restored his complete vision. Leveraging this personal experience in his career, José worked to help others see things in life through a different lens. In fact, once he began semi-retirement, he started writing a book with hopes of changing society's view of culture and nature. José stumbled upon this book idea and A-HA moment for himself in a very untraditional manner.

So we (José and his wife) donated some money (to an environmental cause) and they had this big dinner in (urban city) and they invited us and they asked us to speak...I'm looking out the windows (of the country club) as I'm walking up to the podium, and I had made some prepared remarks, and I'm looking out at (urban city) and realizing wow, there's such a diversity (in this city), and I turn around and look at the audience and everybody is white, everybody is older and it's mostly men...And I'm saying there is a huge disconnect here. And I sort of realized, oh, this is the disconnect that I've been feeling for years. And I basically gave an impromptu speech about the future of the environment movement looks nothing like the people sitting out here...I said, if you look out the window, it's gonna look like the kids that are sitting in the classrooms out there, seventy percent of whom are kids of color...If you are serious about preserving the environment, then you have to get serious about diversifying who's in the movement....so it was a combining of two life purposes.

Although writing about adding cultural diversity to the environmental movement became a major component of José's meaning in life, he spent most of his professional career as a college professor. He was very happy teaching cultural competence in the university setting until one day the administration proposed changes to the curriculum structure. The plan was to move from fourteen weeks of classroom instruction to eight weeks in class adding the remaining curriculum to online interaction. José became frustrated while feeling that he could not effectively teach one-third of cultural understanding curriculum over the internet. When the administration could not provide evidence that this decision was truly better for the student, José quit.

José carefully explained that his decision to leave his tenured position was not out of spite or malice but rather to pursue his passion of diversity education in ways that were not constrained by outside forces such as university administration. While he was not exactly sure what his next path would be, he likened his decision to Indiana Jones in one of the Raiders of the Lost Ark movies.

It might have been that movie where he was looking for the Ark, the coveted Ark, and he gets to this cliff and he sees no way to cross and his guy is saying to him, 'just step out,' and he steps out, he's just gonna fall...And the guy says, you have



to believe. Step out. And as soon as he steps out, the light changes and all of a sudden he sees that there's a stairwell that was hidden, right. And I think some of it is faith, you know, like the spirit's not going to send me out there to dry.

José said that his decision to retire was impacted with the availability of an early retirement package to make the financial and benefit piece work for him. He decided how to bridge his income with consulting work until he qualified for social security payments.

While José claimed to always have held a decent grasp of meaning in his life, he attributed four events that really helped him keep his purpose clear and current. In 2007 he took a sabbatical from teaching, and shortly thereafter he attended a Quaker designed Clearness Circle. Within a couple years' time José added the University of Minnesota's Purpose Project, and the Shannon Leadership Institute to his resume of purpose seeking workshops. He claimed that "all of these little streams of information had trickled and finally had a flow, had a river" as he continued to refine how to live his purpose in life.

José also took a writing course, an experience that provided him comfort to call himself a writer.

But to call myself a writer was a little presumptuous it felt to me. But then I took (a writing workshop) and it was just transformative...But I really don't feel like I can call myself a writer unless I'm writing regularly....It's like a muscle I'm finding out.

As previously mentioned, José's writing project was a slick combination of cultural and environmental awareness. He was writing a book about a new ethnic group moving into a small town, and providing economic resurgence to the community.

There's a scene in the book where...a Puerto Rican woman goes for a walk for the first time in a native prairie and sees this incredible diversity of birds and plants and flowers. And at first...all she saw was, you know, it looked like a field of weeds. So like, her eyesight's being stretched, right, and she's starting to appreciate her new environment and in the process some of the people in her new environment. At the same time the community is becoming comfortable with the diversity of their city.

José likened nature and cultural acceptance to how various parts of nature co-exist in a forest. While there exists predator and prey, for the most part plants and animals of every different color and species learn to co-exist in the same society. He asked, “Why can’t people learn to live like this?” José elaborated that he thinks some people are scared of going into the woods because they do not know what is in there. However, once people learn about animals, and owls, and everything a forest contains, the fear is eased or erased. Similarly, once cultures learn about each other, perhaps they will not let fear guide their judgment.

### **Case analysis.**

*More purpose than money.* What would make José, in his late fifties, who still enjoyed what he did for work, decide to retire before being totally financially ready? José started to see his life, and ways to live his purpose through a new lens. He explained that going through four useful, reflective events helped him realize that being a professor was not the only way to educate others. His experience speaking at the country club showed José a new exciting path to combine the two initiatives he was deeply passionate about. With the university changing their curriculum, José decided the time to step away from his position had arrived.

While José enjoyed taking workshops and seminars to further his classroom knowledge on living and interacting in a diverse world, he took this new set of workshops for personal growth.

While sabbatical provided José with needed reflective time away from his field, he elaborated on the Clearness Circle as the most influential workshop he attended. This day long experience involved industry peers asking each other questions, without asking for answers, about what is at the core of why they teach in a certain field. Through this workshop, José realized that he could “educate” outside of the classroom in a way that could be more meaningful

and without the constraints of university regulations. At that time he was not sure how or when he would leave teaching, but it started the thinking process for José.

Years later, when actually confronted with an early retirement package, José calculated what type of supplemental income he needed to earn to make retirement work. He decided to venture deeper into consulting opportunities to bridge income until his eligibility to collect social security at the age of sixty-two. It was then that José decided that doing work that was more meaningful with less financial security, was more important than life work with constraints and more money.

*Courage to step off.* I asked José if he would have left his tenured professor position had he been considerably younger. He did not believe he would have. José compared himself to the younger faculty who also faced the changing curriculum and believed that if he were their age and tenure, he would have resisted the change a bit but then went along with it. He credited his courage to leave his teaching position to wisdom he earned through experience, maturity and growth as a person and professor. José said he did not have those virtues as a younger educator. As a well-seasoned expert in cultural diversity, José had more experience to draw on to find new opportunities for employment. He owned enough experience to consult or to write a book. However, with experience comes age and José ran the risk of limited future opportunities being someone closer to normal retirement age. He knew he was taking a chance of not being able to find another teaching job had he needed one.

Comparing himself to Indiana Jones was very fitting for José's situation. He was not exactly sure what would happen when he stepped off the metaphorical retirement cliff, but when he did, José's view of the world changed even more. It was after stepping off that he gained the

vision of writing a novel to teach others about his passionate viewpoints. Like Indiana Jones, José relied on his experience and intuition to step off.

*A new way to view conflict.* José spent his life as a fighter. In the 1980s he protested government spending cuts for community action programs. He worked tirelessly for environmental causes and challenged organizations he was involved in to diversify their membership. José challenged his university to provide documented studies on how proposed curriculum changes would benefit students.

All these years of fighting took a toll on José as he became tired of it. When the university decided to put one-third of their semester curriculum online, he quit. He did not want to teach cultural diversity through online interaction. José learned to see the world through a new lens, and uncovered a new perspective. He quickly realized that he did not control the university's decision but instead of fighting he stepped aside and found a new path.

Fighting for diversity and communities was not just a passion for José himself, but he believed in fighting for opportunities that could significantly affect the lives of others. While José did not believe that the curriculum change would benefit students in the long run, he stepped away from the fight. Perhaps José knew from experience that the battle would be futile, or maybe he really was just out of fight. Regardless, José acted in a way that took care of his own needs first. This is not to suggest that José was selfish in any way, but rather, an observation that this time the fight was different. As a result, José's work in consulting, writing, speaking and continued activism might impact the lives of many others based on this well-educated decision.

*Becoming the Don.* José held a unique perspective as a Puerto Rican who lived most of his life in the United States, so he knew both cultures. He explained that one major difference he

saw between cultures was how elders were treated. José expressively described how many of his Latino students sometimes called him “Don Guerra” as a sign of respect for his age and wisdom. José laughed off the student’s remarks and explained to me that he was still a little young to be a Don but he really appreciated the gestures.

If becoming a “Don” was to be seen by others as someone that is wise and can provide guidance to others, then I believe José is on his way. He demonstrated his wisdom by applying a new way of thinking to a new way of doing. He changed his approach to education by becoming a writer rather than a professor. José used his wisdom to stop fighting with the university and realized if he did not want to go along with the changes he did not have to. José used his experience and wisdom to step in front of a group of environmental supporters, without preparation, and provide insight as to how their group needed to embrace the cultural diversity of the next generation to be effective.

**Summary.** José had wonderful things to say about the opportunity to take a sabbatical from teaching in 2007. This started a string of self-reflection opportunities that enlightened José for the next several years. While no one event was the most critical in his journey, José effectively gained wisdom from several experiences and used them as beacons on his purpose laden journey. While always a fighter, José learned to be more open. His lack of energy to battle could have been just the power of new perspectives in dealing with conflict. The decision to retire without a plan or total financial security demonstrated someone who knew himself well. It seemed that Jose had always been wise, curious and open to debate, but the experience of inner reflection actually opened his eyes to the outside world. Like the miracle of sight at the age of nineteen, Jose’s world continued to uncover a new vision as he grew and learned about himself.

**Case #14- Jay, “I still haven’t found what I am looking for”**

Jay took the Purpose Project six or seven years prior to the interview. He retired shortly before the workshop and was looking for ideas for personal development in retirement. Jay worked in training and development during his career and lived in the suburbs of Minneapolis. He was married and his wife had also retired.

Jay called the Purpose Project workshop well designed and was pleased he attended. He always knew that he was a systems thinker that enjoyed working on organizational processes but never called it a purpose until the Purpose Project. Through his work, Jay participated in many different types of workshops and seminars that he felt were a waste of time as they often were just “information dumps.” Conversely, the Purpose Project involved exercises and interaction with other people that Jay considered worthwhile. His takeaway from the day long workshop involved a reaffirmation of what was important in life, and the joy he felt in giving his purpose in life a “face.”

I walked away saying, ‘Yeah, purpose- that’s what it’s all about’ ...I saw a lot of value in it, it reaffirmed some beliefs I had...So my takeaway in terms of the purpose would be to go help create meaning. (I was able to) label it, articulate it, and give it a face...(It felt) great! And, it’s a purpose that I still have. So, yeah, it’s a lasting purpose.

Jay was disappointed, however, when he approached the workshop instructors to suggest some ways to maintain accountability for the class participants moving forward. His thought was to construct a pool of class members that, moving forward, could bounce ideas off each other regarding purpose laden activities.

(My idea) was met with a cold shoulder because in my reflecting on it, it was probably because it didn’t fit into their business model. I still think it’s a good idea, but it’s their business and how they run it is up to them...(I thought to myself) either you see value in this and you want to pursue it, but I don’t want to sit and negotiate with you and try to sell you anything....Life is too short – if you don’t get it, you don’t get it.

This was not the first time Jay had an idea in retirement that was not well received. In fact, he got involved with several organizations that he thought he could help but became frustrated with most of them. When he sponsored a young man through the Big Brother/Big Sister program Jay thought he could help the student look for a good vocational program after he graduated high school. Jay realized the technical college they visited together would probably not be a good option for the teenager. The young man struggled to fill out a basic information card at the orientation. While Jay hoped to help his “Little Brother” with college skills, it seemed the teen really needed basic reading and writing help. Jay was empathetic but frustrated that the program was not what he anticipated it to be.

Jay spoke of other challenges he faced in working with volunteer organizations.

I saw a real opportunity for (a state run higher education program) to package their (program guide) into an electronic kind of format- maybe apps that could be used by anybody anywhere in the world...They did a book. Well gosh, who needs a book?.. They're planning it all backwards...applying it from their cost kind of basis instead of a marketing kind of view.

In addition to working with youth and education Jay was the chairman for the long range planning initiative at a growing church. Through this role Jay uncovered some factors in working with a volunteer organization that he found interesting but frustrating.

We're in the search process for a minister...we don't have any professional leadership in this one hundred and eighty member fellowship and that's a huge, huge problem because we're a bunch of volunteers. (Do we do) everything in a timely fashion? No. Because we are (volunteers) and we have other interests that come first. So in that respect I am dealing with organizations again and I kind of regret it (laughs).

Jay found so much frustration with his affiliations to organizations in retirement that he decided to be far more selective in choosing where to spend his time moving forward. He reflected that he was able to live a more purposeful life when he was still working. When asked what his plan was to spend his time moving forward, he talked about pursuing photography and

glass blowing. Jay speculated these hobbies would satisfy his creative nature, but would lack the interaction with people that he found essential.

Jay said that the organizations he worked at during his career provided a framework and context to create meaning in his life. They provided a way to live out his life's purpose and he struggled to find a similar outlet after he retired. He said, "I don't have an organization to provide the context for who I am. I have to create that context with involvement in new organizations."

As Jay described the challenging experiences he had post-retirement, he analyzed how he responded to the frustration. On several occasions Jay described his motivation to "let go" of his desire to work in new organizations the way he wanted to. He told himself to let go of the expectations he had with Big Brothers/Big Sisters as well as the decision of the state program to publish a book rather than an electronic app. In these and other instances Jay said he "got the message" that things were not always going to go the way he planned.

Further, when describing his effort to continue some relationships at his former employer, Jay said he was alerted to a message there as well. He said he did not realize until after he retired that some co-workers he considered to be friends were "just being friendly" towards him when they worked together. Jay felt these co-workers no longer wanted to be friends once he retired. While he could not understand why they shunned him, he realized that he just needed to let go of his expectation of maintaining those relationships.

When asked if he were able to let go of the past, Jay joked that he could but was worried that he had much more "past" than he had "future." Becoming serious again, he spoke about his decision to live more in the present, something he had not done before. Earlier in life, Jay felt he



was always looking towards the future, but once he retired he realized that he had better start living for today. He realized that tomorrow was not promised to anyone.

When he thought about the past, however, Jay found some insight to what he found important in his work. Claiming to be a “systems thinker” Jay said he enjoyed working “on” organizations rather than working “in” organizations. He elaborated by describing a fear of failing if he were the person in charge of a project or organization. Jay would rather be the number two or three person in charge, as somebody that can make things happen rather than be responsible for it to happen. Working with a major technology company as a client, Jay recalled his salesmanship and creativity in helping the customer expand a training program nationwide when they originally wanted to keep the rollout local. A proud accomplishment for himself, Jay said, which demonstrated his ability and desire to implement something rather than be in charge of it.

### **Case analysis.**

*Trying to re-create purpose in retirement.* While it took the Purpose Project for Jay to give his purpose in life a label and a face, he became frustrated when he could not help organizations the way he wanted to. Being a self-described systems thinker, Jay made creative suggestions to the groups he became involved in such as the higher education board and even the Purpose Project. When his ideas were snubbed he lost interest in continuing with the organization. Jay struggled to find an opportunity that let him continue the work he enjoyed.

Through those experiences Jay reflected and learned about how an organization can provide the framework for a person to live out meaning in life. He also sensed that organizations that are run by volunteers have a different motivation for producing results than businesses where people are paid. While Jay’s work in education and training might be transferable to

organizations run by volunteers or with a philanthropic mission, he was challenged to find the right place.

His approach in retirement was consistent with his self-described philosophy of wanting to work on organizations rather than in them. Perhaps the groups he wanted to work on needed members to work within them instead. While Jay believed the ideas he had would work, he might not have been involved with the group on a deep enough level to know how they worked. Perhaps that insight would have allowed Jay to present his ideas in a manner that made the organization more receptive. Otherwise, the organizations were getting new ideas from someone they may not have known that well yet.

While Jay decided to “let go” of his expectations, he also chose to look for other organizations with which to become involved. He said that while he was frustrated and wanted to be more selective before getting involved again, he still felt he had value to offer the right opportunity and was not going to quit trying. It appeared that Jay was looking for the satisfaction of making suggestions for improvement, but not being involved with an organization on a deeper level.

Jay wanted to only be involved with groups in ways he found meaningful. When the young man he was paired up with through the Big Brother/Big Sisters program showed he needed help different than what Jay wanted to provide, Jay pulled back from the program.

Perhaps Jay was also held back by his own fear of failure, which he admitted. Not wanting to be in a lead role, Jay preferred to stay behind the scenes and make suggestions of improvement from the outside. While this seemed to work for him during his career, it proved to be a challenge for him in retirement.

***Wants to be valued by others.*** Jay spoke very proudly of his work in expanding the training protocol for the technology company during his working career. He called the training coordinator he worked with bright and wise to take his suggestion. The success seemed to be very important to Jay as his face brightened when he described it. But how could Jay feel valued after he retired?

It seemed that no organization was interested in Jay's suggestions outside of his workplace. This led to his revelation about only being able to live out his life meaning through an organization. Might some people just have an easier time feeling valued in their work than in retirement? Therefore, how do people feel valued outside of their work career? I felt Jay was on this journey. While Jay was involved in his church and some other volunteer groups before he retired, he did not mention any other activities or hobbies that brought him satisfaction. In fact, when he spoke about trying photography and glass blowing to exercise his creative side, he immediately discounted the value he would feel because they did not involve interacting with people. Working and helping people seemed to be where Jay felt valued.

***Taking care of an organization.*** Jay's experiences led him to observations about how the alignment of purpose for people and organizations intersect. He compared an organization to his own experience in marriage where he may make decisions that were not in his own best interest but were in the best interest of the marriage. Comparatively, he stated that people often do not consider the interest of the organization when making most of their decisions. Rather, people are focused on how a decision impacts themselves. Jay continued by stating that if people "do not take care of the organization" the group would cease to exist.

His thoughtful insight did not align with his own actions in retirement. Jay seemed much less interested in working on the core interest of a group, but rather wanted to provide them ideas

for his own fulfillment. Jay's ideas might have been very useful and insightful to the organization he approached. The reason for his involvement, however, seemed to be inconsistent with his statements about what is best for an organization, may not be best for an individual.

**Summary** Jay's story depicted an outwardly focused person who was learning how to re-create purpose for their life in retirement. Knowing that systems thinking worked best in an organizational structure, Jay naturally tried to get involved with groups the way he felt he could best contribute. While his frustration led him to be more selective of how to get involved, he still felt that organizations would be the best outlet for him. Jay learned about letting go and living in the present. He evaluated future interests for the creative outlet they could provide with the limitation of not being people focused. Jay spoke little about how his wife or family provided meaning for himself, nor did he seem comfortable just enjoying the accomplishments he had made. Jay was on a journey to find a way to live a meaningful life, he just had not yet found was he was looking for.

#### **Case #15- Robin, "A REAL horse"**

Robin was a retired actress and professional fundraiser who embraced life and people. She divorced from her husband many years ago, had adult children, and planned her second marriage, to a woman this time, to take place a few months after this interview. Robin, in her early 60's, participated in a number of self- reflection workshops for fun and to learn more about herself. While she found the Purpose Project exercises unmemorable, Robin remarked that she found the stories and plans of others at the workshop quite interesting.

The magic of acting, according to Robin, is the ability to take an audience to a different place and time, if only for a couple of hours. She went on to say that connecting people to a story, event or a faraway land takes smart, dedicated actors who understand how to sell a role to the audience. However, Robin found to be an actor or actress required a number of rehearsals,

lots of memorization, and terrible late night hours. “It is awfully hard to take care of a family and be an actress at the same time,” Robin said.

Robin learned that the same joy of connecting people to something could actually be achieved in other areas, such as fundraising. So, when a friend suggested this alternative to Robin, she tried it.

I didn't have to put on makeup and pretend to be someone else every night. I just had to figure out what someone else, either a grant maker or a foundation, or a corporation or individual wanted to have happen. And sell it. An actor sells something from the stage and I sold something about an organization to a person, corporation or foundation. (It is) making a connection. All the time.

Robin supported her thoughts with a story about a former bank executive who never could afford a letter jacket in high school. By arranging dinner with a college dean and the banker, Robin had the university marching band show up to play, and present the retired executive with his very own varsity letter jacket. This moment brought tears to the banker's cheeks, and a pen to his checkbook. “That was his connection,” Robin said, “We hit his story.” Robin carefully described her passion of making connections in the fundraising role as different than exploiting people. She made very sure to point out the true intention of making dreams come true in fundraising, versus being seen as a hustler. The difference she said is how her joy comes not from how much money can be raised, but rather how many happy tears are shed.

Now that she had mostly retired from fundraising, Robin found time doing more activities she enjoyed such as gardening, travel, spending time at the cottage and volunteering in nature centers. Robin's voice purred as she explained how much she “looooooved” kids and how exposing them to nature was one of her favorite activities. She realized that what she does in her volunteer work is really another type of matchmaking, characterized by connecting children to science.

I had a group of kids coming from an inner city school and they were so excited when they got to the (nature center). On the way down, they saw a REAL horse on some farm. They kept repeating that over and over, a REAL horse. These kids had never seen a horse before. It is those types of connections that I think can be so meaningful.

While making connections was a lifestyle for Robin, she was not always able to label her meaning in life as she can now. She confessed that raising a family kept her very tasked and busy so Robin did not take time to stop and think about what was really and truly important to her. She explained, “My mind was too full. I was doing too many tasks. I couldn’t (live my purpose). I don’t remember a lot of stuff about my kids growing up. I wasn’t paying attention to life.”

Robin was fascinated with people. She commented that people make the art, they write the books, and they direct the plays. People are behind everything that is great in the world. Robin described herself as an enabler, but in a good way. She is motivated by enabling people to be the best they can be, and in many ways to make their dreams come true. She said, “To me life is people. That’s all I can really count on. (People are) what makes me happy, except for animals.”

Robin preferred to live life in a conscious, unplanned manner. She joked that she is known for having hosted a dinner party that started at 6:30 PM and been at the grocery store a mere thirty minutes prior. “That is not an exaggeration,” Robin quipped. Not being much of a planner, Robin also worried that her upcoming wedding, a second marriage, would wear her down with the necessary planning required to pull it off.

While the wedding will be a joyous occasion, looking into the future brought a bit of sadness to Robin. With her children grown, her body showing its inevitable frailties and her mother’s age slowing her down from joint activities, Robin felt she needed to re-invent parts of

her own life again. This will not be a new endeavor for Robin, however, as she learned how to become very resourceful after her divorce years ago. She reflected, “After the divorce I decided this is it, I can only depend on me now. Be resourceful, this is it...Buck up baby.”

### **Case analysis.**

*Watching change and connections happen.* Robin remarked several times about her love for people and being witness to their connection to things. Whether it were connecting an audience to a story onstage, kids connecting to science at a nature center, or financial donors to a worthy cause, Robin enjoyed being the catalyst, connector and interested observer. She had a special love for college aged young adults as she found their curiosity and ability to change quickly quite remarkable. Based on her remarks, I got the sense that Robin equated her own curiosity and ability to adapt in life to that of a college student as well.

All of Robin’s stories centered around connection and changes. For example, Robin described her love of gardening and nature. While she planted flowers and vegetables in her garden, she enjoyed the growth and change of her plantings more than the final result of something to eat or pick. Robin also spoke about her personal connection to nature when she drove to the family cottage in Northern Wisconsin. When turning her car off the highway, Robin’s mind immediately pictured herself paddling in her kayak on calming lake waters. She emphatically described her natural improvement in mood when she connected with that vision.

Although she embraced change, interestingly, Robin is not a planner. She despised planning. One sense is that while planning can engage both connection and change, a designed plan does not happen quickly or naturally enough for Robin. She enjoyed a more spontaneous change. Connections and immediate reactions from people interested Robin more than what a designed, planned change might manufacture.

***When to find purpose.*** Robin said she deeply regretted not living a more purposeful life during her child rearing years. Being so task oriented, she never took time to slow down and think about what was important in life and to herself. I asked Robin if she could go back and live a life “more on purpose” what she would have done differently? She immediately described a life of being an academic that could follow her own curiosity and support young people to pursue their own deep interests.

I wish young people would talk about this (purpose) in college. And not like a big puffy thing, but like little purposes all the time. Talk about what their purpose is in anything they are doing. Like their J-terms (January semesters). Even in choosing that elective. What is this (class) going to bring them? Is it just getting an easy “A”, ok, but what excites them? But define what those things are. Make those internal definitions. I think people would be so much happier and well off. And I don’t think people would buy so many useless things (to find happiness).

Her insight to finding purpose in every small thing that people do came from a lifetime of experience, with a continued curiosity about enabling others, as well as herself, to that next connection.

***Connect to people.*** The real horse and letter jacket examples served as simple recognizable memories for Robin in recalling fulfilling moments for other people in her life’s work. These two symbols illustrate Robin’s inner connection to work that she found fulfilling. Robin’s story seemed to lack examples of making deep connections to people, who she frequently said were very important to her. Not to discount the value of her relationships outside of her partner or family, she had few stories about deep connections to other people. As someone who prided herself as skilled in making connections, she did not describe many connections for herself.

***Working through fear and anxiety.*** Robin’s journey was not always simple as she dealt with career changes, divorce, and a continued need to re-invent herself. She said that staying



focused on working with people helped her move between acting and fundraising. She also learned to be “resourceful” after her divorce and figured out the basic measures needed to provide for herself and her children. That period of life taught Robin how to connect with, depend on and trust herself.

Her perseverance however did not come without fear and anxiety. Robin faced the challenge of change again as she progressed through retirement. She mourned the loss of fewer active times with her busy adult children and aging parents. With age came body frailties that Robin knew would only get worse for her. What she learned about herself however, is the confidence that staying focused on things that are fulfilling in life will help her move through that transition as well.

**Summary.** Robin’s spirit is like a curious teenager but with worldly experience. She spoke in a very emphatic, dramatic and ecstatic manner throughout our time together. Referencing love for children, college aged young adults, and those that make the art, music and plays, of Robin’s care for all people was obvious. As she looked further down the retirement road she saw herself continuing to support charitable organizations. While donating money is how many support a good cause, Robin backed up financial help with getting involved. Not only does participating help her connect to the core of how the organization works, it fills her desire to be with, and hopefully connect with like-minded people.

#### **Case #16- Flo, “I wanted to shout my purpose from the rooftops”**

Taking the Purpose Project a full six years prior to retirement, Flo had an opportunity to plan for her big day as she wanted. She retired in February 2012 and had not looked back. While she enjoyed her work and found it fulfilling, Flo was excited to move into a new phase in life. She lived in the west suburbs of Minneapolis, close to where she used to work in education. Flo enjoyed throwing parties, running and anything fitness related in her retirement.

It was the calling card exercise at the Purpose Project workshop that labeled Flo's purpose as "helping others reach their potential." While she already had meaning in her life from activities and relationships supporting this purpose, actually giving it a name made her want to "shout her purpose from the rooftops." Flo said the purpose naming revelation validated her work and put the pieces of her life together personally and professionally.

Taking the Purpose Project served two roles for Flo. Knowing that she would qualify for the school district's "rule of ninety" in six years, Flo wanted to have a plan for her retirement. (The rule of ninety is a formula used by many Minnesota schools that add age and number of years of service for a union employee to set their retirement date. When the two numbers add to ninety, the employee is eligible for their pension and retirement). Flo also felt the workshop, like many similar workshops she had taken, would help her when supporting her direct reports in finding passion and purpose in their life. At the time, Flo supervised over one-hundred young adult leaders in after school and summer school activities for the district.

I felt like my calling card was helping people reach potential. I felt that way with staff, I felt that way with the children we were working with, and even with the school district...I wanted to shout (my purpose) from the rooftop! That's what jazzes me...I felt like I was working with people based on what their gifts were and helping them grow. That was really important to me.

When Flo completed her Master's degree in educational leadership she summarized her role in leading young people as three steps or goals. She helped them learn what they enjoyed about their work, taught them to identify their true strengths, and searched for what motivated them to succeed. It was through this lens and activity that Flo felt meaning in her own life, and owning the knowledge that this was the type of work she found enjoyable and motivating.

Flo also found meaning in her work when she could focus on a few simple programs. However, shortly after the Purpose Project and still six years until retirement, Flo was asked to

take on a new role in the district. Flo found the new position challenging in many ways as it required her to focus on many different tasks. She said, “When I moved into this new job I was wearing ten hats, and I felt I couldn’t do anything well.” She eventually found a way to adjust and joyfully described a new after school program that resulted from her diligent work to bring groups together.

There were several pieces that needed to come together for this new program to succeed. In addition to identifying the need for a better after school program, Flo found the financial backing and strong partnerships in the chief of police, food suppliers and transportation officials. However, it was Flo’s unwavering belief that this plan would work that brought everything together.

Clearly there was a need. We needed to find things for kids to do during the summer to give them choices to stay out of trouble. And the police chief was SO on board...It was hard to get people to really see this is possible, it’s important and it’s going to benefit everyone...What made it successful? Clear vision, having resources, and belief it would work even though it was hard work...When I reflect on it, I know how hard it was...I don’t ever remember a time when I thought this isn’t going to work.

Flo’s plan for retirement came together as she became comfortable with her financial calculations and was excited when an associate was named her successor at work. Flo took pride in her work, and having someone who shared her passion take over her role was meaningful she said. Retirement seemed to be a very freeing time to explore new parts of life for Flo and she wanted to do it right.

It was really important for me to have a plan for when I retired. I set goals for my myself all through my work so I thought I should make some goals for retirement...I just thought I’m going to be SO ready for this...I want to do this right.

Stating that she thoroughly enjoyed retirement, Flo was still searching for something to be involved with on a deeper level. She committed to very few things but would not give up

Wednesday night choir group for anything. She enjoyed the energy, the music, the learning of songs in other languages and especially sharing a passion with other people. Flo wanted to find more activities like this. She dabbled in a few other things but so far had yet to find anything meaningful enough to make a commitment to it.

Flo said she enjoyed diving deep into topics or ideas and sharing what she learned with those who were interested. For example, if a niece or nephew were taking a trip somewhere, Flo would send them articles and books about what to see and experience. Flo did similar research for co-workers and employees she led but now realized that it was much harder to find people to do this for in retirement.

Vacations had taken on a new context for Flo as well. While she used to travel to relax and read, she now looked at trips as an adventure and wanted to do active things. She said, “Even vacations are not the same...I don’t want to go and relax. I want to go climb a mountain or do something. I can relax another time. So that’s different.”

Flo continued to search for something more in her retirement. She had a hard time describing to others what she enjoyed doing now that she was no longer working. While she found this feeling unsettling, she remained calm and un-panicked about the continued void in her life. She felt like she was living in the present, but her new identity would be better defined in the future. Flo thought others saw her as an educator and program director when she was working, but now was not sure “what she was.” She wanted a better way to describe herself.

I would like to come up with a better response when people ask me what I am doing in retirement...I thought I would be more focused. I thought I would be clicking stuff off a list but instead I am just going with the flow. But I’m ok with it...I envy people who seem to have a clear path (to purpose). I strive for clarity...I’ve been trying to figure out what is that purpose now. You know what is that giving back piece...But every day I wake up and I say thank you for giving me this opportunity (to be retired). I love it. Every single day I am grateful.

**Case analysis.**

*Separating self from role.* Flo commented early in the interview that she saw her job as a way to create income and did not want to be defined by her work. Her further comments seemed clear that she wanted a clean break from work when she retired. When I questioned Flo further, she elaborated on her meaning of a clean break. She did not want to be identified by what she used to do, did not want to have any regrets about retiring, nor did she want to feel pulled back into work if the programs she supervised ran into trouble. It seemed clear and consistent that Flo really wanted to move on with her life when she retired. Sundstrom, Burnham and Burnham (2007) described the need for a worker to relinquish their attachment to their work in order to move forward to redefine and re-create their life. Flo's decision seemed very much in line with that theory.

Flo continued to look for ways to re-create the meaning in her life however. It seemed that her job created the context for her self-described purpose by allowing her opportunities to help students, and supervise leaders and community members to identify and grow into their potential in life. Without her job to create the environment for those opportunities Flo felt unsettled that she was not able to find ways to "give back" to people the way she wanted.

*Creating a new self.* With all the accolades and praise given to the Purpose Project by Flo, she did not speak about ways she learned to live her purpose in retirement. While identifying what gives a person meaning in life might certainly be the first step, finding the right outlets and ways to live your purpose was lost on Flo. She firmly described the value she felt in being part of the Wednesday choir, but had yet to find another activity that moved her as deeply. Her approach was to dabble in various activities and groups to see if she enjoyed it to a level of committing more time to it. However, if on the surface an activity did not seem meaningful, Flo

did not pursue it further. Because she enjoyed diving deep into information and research for others, might she find more meaningful interest in something by learning more about it? It did not seem to be an approach used by Flo thus far.

It seemed Flo was satisfied with the results of the hard work and creativity her work projects provided. Not only was the work with projects and people meaningful, she spoke about how energized she felt afterward. Was Flo now looking for ways to reach her own potential? While she aspired for a clean break she also described a drive to continue to “give to others.” Might Flo be giving herself mixed messages as to what she really wanted to be or to do? At the time of the interview she was only eighteen months into her retirement, Flo may need more time and experience to help her on the journey for recreating herself and to find purposeful activity.

***Relationships.*** Flo spoke about being involved in the lives of her nieces and nephews but did not discuss any spouse, partner or children of her own. She described a time of caregiving for her parents, who had since died, and the value she felt in “giving back” to them during their end of life stages. By the way her face lit up when speaking about those she coached and supervised during her career, it seemed that developing meaningful relationships was important to Flo. But where did Flo receive love or support in her life? She spoke about many friends and quality time spent with former co-workers so it seemed she had no shortage of people in her life. But what was missing was any story of those who helped Flo reach her own potential, or helped to identify what motivated her in her new stage in life.

**Summary.** What drove Flo to want to continue to “give back” to others so deeply? What motivated Flo to desire a clean break from the work and label during her educational leadership career? My sense is that she found meaning in supporting others and added research and resources to assist them on their journeys. But upon retiring, Flo wanted to experience more for

herself so she held back on commitments, and focused on her fitness, health and freedom to live in the present. As she enjoyed her retirement, Flo wanted to return to some meaningful activity but without a large commitment that compromised her feeling of independence of time and structure. While her concern was about what to tell others she was doing with her retirement time, I think that was really the question she was asking herself. What seemed to anchor Flo was although she felt unsettled, she remained calm and confident that she did the right things. Her strong belief in herself and her journey seemed consistent with how she pulled others into believing the after school program would work. She demonstrated a way to move forward, despite the hard work, and proof it would all pay off in the long run.

### **Cross Case Analysis**

On completion of the individual case analysis, I moved into the analysis of emerging themes across the cases. As stated in the data analysis process of Chapter Four (page 23,) four themes emerged in relation to self-reflection, transitions in life, relationships and organizations. The transitions theme seemed to be comprised of two parts: the value of purpose in life while navigating a transition and the fact that many transitions are comprised of several different types of transitions nested together. Breaking this transition theme into two separate pieces resulted in a total of five themes discussed on page 125.

Table 2

*Example of cross case analysis*

	How did you learn about what gives your life meaning?	what is it that gives your life meaning?	how does it feel to know you have purpose?	What effect, if any, did the purpose project have for them	how has purpose (knowing) affected decisions in life?
Flo	purpose project named it	doing research for people on their interests	VERY strong	huge effect- very validating	still looking for purpose in next phase in life
Jessie	Purpose Project named it	awakening spirits- holding the match	very validated	huge effect- very validating and good guide for future activity	made sense of past and provide vision for the future
Richard	Always doing what he liked	cursillo, writing, prison ministry	knows what it is but not a big impact	not much but liked it	keep doing all the things he has been doing
Judy		educating others about living wills	healing	helped her heal	safe to expose herself and story
Rose	age, experience, reflections, wisdom	people	good' changing her view is best	fun way to spend the day with friends	people vs things
Lois	upbringing	wholeisitic work with people	very strong- but unbalanced	learned about dealing with narrow spaces in life	dealing with narrow spaces
Mary	purpose project validated it - parents	mentoring teachers	searching for new ways	validation that her career choice was correct	validated
Kate		demonstrating love for her family	very very important	none really	deeper and deeper into family
Luda		hospice- connecting with families		too big of a group and not a good fit for an introvert who wants to learn but not share	
Jackie	wisdom, experience, Landmark Forum	giving back	feels it's a blessing and a curse	fun way to spend the day with friends	synchronicity
Dewey				"helpful" in small ways	
Ed	slowed down in retirement and took time to think	educating others about underprivldged	OK but frustrated	made him realize that people don't learn about purpose early in life. And who should teach it?	
Debbie	feedback from those she helped	caregiving- elder health	good but unbalanced		easy to move through transitions
Jose	Mostly Clearness Circle and Shannon institute	nature and cultural awareness		too many of the same people so not diverse enough to e effective	step away from career to pursue passions in new way
Jay		systems thinking for organization	frustrated	gave the organization advice that they didn't want	needs organization to provide context for his purpose
Robin	expereince connecting people	connecting people to things, dreams and each other	good	when to find purpose in life	keep finding ways to connect people and things



**Overview of five themes.** The first theme was the recognition of purpose in one's life as a result of time spent on reflection of self. I found the participants who self-described a high level of fulfillment in life had spent time learning about themselves through various methods of self-reflection. They reflected through introspection, coaching, attending workshops and seminars, and just taking time to think about what they valued in life. Meanwhile, others who stated they were still searching for something more meaningful in life, seemed to have started some self-reflection, perhaps had some eye opening experiences, but were still learning more about themselves. Finally, a few other participants did not speak about, or seemed to not have been self-reflective, and most said they struggled to find a meaningful way to live a life of purpose.

The second theme was ways that purpose in life affected an individual's transition through various life events. It seemed that some people who had identified purpose in their life made meaning of past events, decisions or transitions they made. Also, in several cases purpose served as a guide through the grieving process stemming from a life transition.

The third theme was the multi-faceted nature of transitions, and how people who were able to identify and address the various components of a single life event, were able to move forward in life. For example, a person who retired might need to grieve the loss of identity and fulfillment that comes from feeling productive at work, in addition to the relationships one created in the workplace. It seemed that those that were stuck in grief, even with an identified purpose in life, had not identified or addressed one or more of the other components of loss in their transition. I will describe the various components in more detail in the next section.

The fourth theme was the effect of an individual's relationship with friends, family, co-workers and self as they identified purpose in their life. It seemed that as purpose revealed itself

to people in this study, they migrated to relationships with others who either shared a purpose, or also recognized the value of purpose in their life. Additionally, the journey of purpose identification in life showed to be a very personal adventure where many found comfort and satisfaction in learning about themselves and what is important to them. They often connected with themselves.

The fifth theme is how an individual's pursuit to live a meaningful life can be supported or constrained by an organization. Some study participants were keenly aware of how their organization or industry's mission and operation either supported or constrained their personal pursuit of living a purpose filled life.

### **Outline of themes with subthemes**

As the themes emerged from the study, various subthemes aligned to support the findings.

**Theme I.** People who were able to self-reflect seemed to have had greater success in the identification and practice of living a purpose filled life.

1. Those who found meaning seemed self-aware, and consciously lived in the present.
2. Those who were still actively searching for meaning in their life seemed to enjoy and value learning about themselves.
3. Those who did not feel fulfilled tended to not have been self-reflective, were outwardly focused, and looked to other people and activities to find meaning.

**Theme II.** Some people found value in knowing their purpose when they faced transitions in life.

1. Naming purpose helped some validate their past actions and emotions to move through lingering transitions.
2. Having an identified purpose in life helped some people to let go and accept loss.
3. Those with a clear purpose and passion for what they did often moved more easily to the next meaningful activity, job or relationship using their purpose as a guide.

**Theme III.** Transitions can involve several components of loss which sometimes need to be addressed separately.

1. Retirement transitions may involve loss of role and relationship.
2. People can get stuck in the grief of losing a person close to them, if they were a primary caregiver, and do not address both role and relationship.

**Theme IV.** The development and dissolution of relationships can be affected by one's recognition and desire to live a purpose led life.

1. As some found purpose to be a larger part of their daily life, they consciously migrated to new friend groups.
2. Maintaining or losing relationships with co-workers.
3. Developing a deeper relationship with self during purpose discovery journey.
4. Curious absence of deepening relationships with family members.

**Theme V.** Organizations can play an influential role in an individual's pursuit of living a purpose filled life.

1. For some, an organization or industry provided the framework, people or situation for purpose or meaning to be exercised.
2. For some, an organization became a constraint in which to exercise, pursue and deepen purpose in life.

## **Analysis of themes and subthemes**

**Theme I: People who were able to self-reflect seemed to have had greater success in the identification and practice of living a purpose filled life.** Through the analysis of data across the various cases three distinct groups of people emerged. One group had each voluntarily stepped away from their career to pursue a deeper purpose in their life and work. A second group were qualified for retirement through a company supplied pension. A third group had no common retirement qualification but were connected with their search for continued purpose in life by becoming involved in new organizations.

In the first group Rose, Jackie and Jose all voluntarily stepped away from their careers while in their late fifties. While each told an unique story of how they arrived at the decision to retire, a common characteristic for all was the clear identification of leaving work to pursue meaning in life in a deeper way. Richard and Jessie retired at different ages and stages than the first three, but also clearly identified ways to live their lives in a meaningful way and spoke of feeling deeply fulfilled in life. Each of these five demonstrated a clear and calculated path to finding and demonstrating purpose in their life.

The majority of the second group had decided to retire in their late fifties as they qualified to receive a pension from their employer. Dewey, Flo and Mary were excited about retiring but each described their journey as being “in process” as they learned about themselves and ways to re-create meaning in their lives. Additionally, Judy left her job when it “no longer fit” and she could make her financial situation work. She too was on a path of learning about self which will be described in the second section below. While Lois and Kate both felt they clearly identified purpose in their life, they struggled to find balance when they retired.

However, they described that what they learned about themselves had significantly improved how they felt about what they were doing with their time and interests.

The third group described frustration in continuing a purpose filled life in retirement. They told stories of how they attempted to continue to work with organizations in retirement but were shunned, not listened to, or rebuked for their ideas. This group seemed to continue to look outward, versus inward, to find meaning and purpose in their life. Ed and Jay described frustration about how they felt disrespected and demoralized when others would not listen to their ideas and suggestions. They were both learning to let go of their expectations but described a continued need to look for other outlets to live a purpose filled life.

*Being self-aware.* Those who found meaning seemed to be self-aware, and consciously living in the present. In each of the stories for Richard, José, Rose, Jackie and Jessie they all spoke about being clear about what was important to them in life. In addition, they described a process as to how they had reached that point in their lives. In each instance, they became aware of something about themselves that they found to be moving, clarifying or motivating. After having this A-HA moment, they consciously took action, which in most instances, took them to a new path in life. Each spoke confidently and comfortably about what they had learned about themselves. Rose wanted time more than money, and José decided that writing instead of teaching would be a new way to live his purpose. Jessie suddenly embraced her purpose and found new ways to help others awaken their spirit inside. Jackie found that helping people deliberately change their lives was the real reason she was a psychologist and found new ways to help people change. Richard always followed his heart and mind and even more importantly did not want to do the things he did not have interest in.

While many of these five seemed to live self-described balanced and meaningful lives, they continued to connect with themselves over time. Many had an A-HA moment which opened their eyes to something about themselves. Often this revelation took experience, reflection and interaction with others in a workshop or seminar. Jackie's eyes were opened at the Landmark Forum and José spoke about insights he gained about himself during the Clearness Circle experience. All five had positive remarks about the Purpose Project as well. It seemed that being open to learning about self, and actively reflecting on what was important in their lives brought awareness to new ways of living in a meaningful, fulfilling manner.

Most of these five participants, and select others in the study, spoke about the value of slowing down their lives to determine what was important to them. Some intentionally slowed down their life by making fewer commitments, or by not working as many hours to achieve that next promotion in their career. Others naturally had life slow down for them once the responsibility of raising children had ended and the kids were grown and out of the house. Rose spoke about her body slowing down physically and how that caused her to think about how to use her time and energy more wisely and purposely. In all cases, once life slowed down for these participants, they reflected more about what was important, and what they hoped for their life.

Another interesting concept was how some looked at retirement as being a "finish line" where they would start living a life that they controlled. Upon retiring, many felt that it was "now or never" to experience more meaningful things they had always wanted to try. What made this even more interesting was that when these people recognized their desire to live in the present, rather than looking towards the retirement future, they seemed to be more present in life.

For example, Rose realized that just being with people was something she really enjoyed when she starting living for today.

Each of these five spoke about deliberate reasons for entering their chosen field of work. It seemed that even early in life they chose a path to do work they found meaningful. For example, José enjoyed teaching about cultural acceptance, Jackie wanted to help people as a psychologist and Richard was excited to write about agriculture. However, as these individuals learned more about themselves and how meaning in life continued to develop for them, they found their careers to be constraining to their purpose. In most of these cases, the desire to live a life of deeper purpose caused them to leave their jobs. While purpose seemed to always be present in the lives of these five people, as they learned more about themselves, their experience, and awareness moved them to make a change in how they spent their day.

Finally, I learned from this group that while WHAT someone did may be important, a deeper sense of fulfillment came from knowing what they loved about it. This group did not just do the activities that they loved, but rather brought what they loved to what they did. Jessie spent her time bringing her therapy dog to schools, nursing homes and hospitals. Just as in her work life, she helped others face their fears and uncertainty, but this time she used the dog to help strangers feel comfortable talking about their problems. Jessie knew WHAT she loved, which was helping others face fear, and brought that purpose TO her activities. Richard's love of writing followed him into retirement as he worked in gardening and prison ministry. While the latter activities brought Richard joy, he also applied his love of writing to them to make the experience even more meaningful, as this combined several things he enjoyed doing.

In addition, I learned from Richard's story that he brought what he loved to his activities, in this case writing, because it brought him joy and not just because he was good at writing. In

contrast, Mary found that continuing several activities in her old school district made her feel needed, but she commented that the fulfillment was not very deep as she did not necessarily love doing the activities. Mary said she knew how to help teachers sort through books in the classroom, and while it made her feel needed or wanted it was not deeply fulfilling. While Mary enjoyed doing some activities, she did not know what she liked about them. In summary, knowing what was meaningful about doing a certain activity became useful in finding other ways to express that meaning.

*Learning about self.* Those who were actively searching for meaning in their life seemed to enjoy and value learning about themselves. When provided the ability to replace their income with a pension, Mary, Flo and Dewey all chose to retire. Additionally, Judy found a financially feasible plan to retire before the age of sixty. Interestingly, each of these four revealed that they did not have a concrete idea of what they wanted to do once they left their jobs. However, each spoke about how they learned about themselves once they retired and how they sorted through activities that were meaningful versus ones that just took up time. In each of these cases, the participants left work because they could afford to do so.

Flo enrolled in the Purpose Project shortly after retiring to learn more about herself and what types of activities she should get involved in. When she was able to identify what her purpose was, helping others reach potential, she was so overjoyed she wanted to shout it from the rooftops. Labeling her purpose was a first step for Flo but she continued to struggle with finding meaningful ways to spend her time other than singing in the choir. While her singing was not aligned well with her self-described purpose, upon reflection, she realized what it was that she liked about the choir. Although the singing was fun, she enjoyed learning songs in new languages and interacting with others who shared a passion for the choir. This interaction



brought energy and meaning she said. Flo learned WHAT she loved about doing something.

Could she now have success finding other activities where she could share a passion with others?

Dewey entered retirement with a clean break from the military. He immediately sought a personal philosophy which he said he never developed in life. He enjoyed reading and listening to others about their retirement plans. Dewey read about man's ability to choose in life and immediately applied it to the decisions he had made for himself. He stayed uncommitted as he developed a comfort with himself in his new found freedom from commitment, maintaining secure communications and responsibility to others. He learned he valued being responsible only to himself and his wife.

Mary continued to work part time as she adjusted to retirement. However, she protected the time she took for herself in exercising and going for her Friday morning walks with a friend. She too had tried many activities but claimed that so far what she really enjoyed the most was spending time on herself. Likewise, Kate commented on the value of going to Mass and exercising by herself as she learned to take time caring for her own needs for a change.

Judy had a traumatic entry into retirement with the death of her husband and subsequent abruptness in quitting her job. However, Judy calmly described reflection on her need to learn how to be a friend to others. She claimed that learning to be a friend was new to her, and may seem strange to others, as her husband was her one and only true friend. Judy also learned that writing was an outlet for her to share the pain of her experience, something she did not realize before she retired. And while she was not totally comfortable being in the spotlight of something, such as a newspaper article, Judy learned that she could tolerate the attention for the value that others may take from the story. Other than writing, Judy had not found the activities

she wanted to spend time doing, however, she was proud of what she learned about herself and how to move her life forward.

In each of these cases, the commencement of self-reflection mainly took place after the person retired. While each individual journey involved a number activities and ways to spend one's time, the meaningful stories came from what these individuals learned about themselves.

In addition to self-reflection, this group also searched for purpose in a way that was most familiar to them. Mary continued to work part time in the district as she liked to feel needed and wanted to maintain friendships with co-workers. While she looked for other meaningful ways to spend her time, she felt comfort in continuing to have a familiar place to go, with familiar people to socialize with. Dewey, on the other hand, made a clean break from his work but performed his outward focused purpose searching by gathering loads of data, a method he was comfortable with. Like a military commander needing to make an important decision, Dewey read, asked questions and spoke with lots of other retirees about what their plans and ideas were to spend this newly found free time.

As they embarked on their private retirement journey Dewey, Flo and Mary all consciously decided to not make many commitments other than taking ownership of their life and time. Finding that slowing down and learning about themselves was interesting, they wanted to increase the time they spent to think, experience, explore, reflect and process this new stage in life.

***Outwardly focused.*** Those who did not feel fulfilled tended to not have been self-reflective, were outwardly focused, and looked to other people and activities to find meaning. While each of the participants in this third group also attended the Purpose Project, they did not

seem to have experienced a self-reflective time or process. Those in this group spoke about the meaning they tried to find by working with, helping and providing information to others.

Jay's story was about re-creating meaning for himself by helping volunteer organizations run more effectively. When the groups did not seem interested in his help, he retreated and looked for other organizations with which to work. When he was rebuked by a few more groups he started to reflect that perhaps he needed to change his expectations of others and let go of what he thought these groups needed to do.

Ed also became active in retirement working with organizations that served the poor, the underprivileged or children. He learned that when he could not be effective with the group the way he wanted, he too retreated and looked for new organizations with which to associate.

Many who found caregiving as a meaningful activity in retirement found themselves out of balance. It seemed that Kate, Lois, Debbie and even Jackie got so involved with the care of others that they neglected their own needs, such as support and encouragement from others, or simply doing things for themselves. This lack of balance became puzzling and troubling for all of them. While they were aware of being out of balance, they said they did not know how to change it. Again, in these cases it seemed that an outward versus inward focus provided an empty road to finding meaning and fulfillment.

In some cases, living a purpose filled life through caregiving kept people out of balance. For example, while Debbie claimed that her life was meaningful when she cared for others, she asked family members to pay her, at times, to make her feel worthwhile. So did caregiving really provide Debbie meaning if she also needed to be paid? Lois commented that she "thought she would die without purpose in her life."

Was caregiving of others really that important to these participants or was there something deeper that was behind these feelings. Again, becoming more outward focused then inner reflective seemed to be what led people away from feeling deeply fulfilled and experiencing a balanced, satisfying, purpose filled life.

**Theme II: Some people found value in knowing their purpose when they faced transitions in life.** While retirement was the main transition I studied, the case stories revealed several types of transitions. The loss of caregiving, relationships, people, and many other types of losses created a multitude of transitions for those interviewed in this study. However, the stories merged at times to reveal that purpose helped validate actions and even heal emotions that took place in the past. Purpose identification was found to be useful to help some through a transition or even serve as a guide for future transitions.

*Naming purpose.* Naming purpose helped some validate their past actions and emotions to move through lingering transitions. The calling card exercise used at the Purpose Project seemed to be a useful tool for some to validate and even rectify past experiences. When Jessie accepted her purpose label of “awakening spirits” she realized and embraced the emotions she experienced in the past. She even started to move through the lingering grief of her mother’s recent death. While it was not clear if these two occurrences were directly related, it did seem very apparent that Jessie moved to a new stage in life once her purpose was identified. Stating that, “Awakening spirits described all of my work,” Jessie found many new opportunities to express purpose moving forward.

Likewise, Flo labeled her purpose at the Purpose Project and felt a sense of relief that her work now made sense to her. As she was still on a self-discovery journey, this revelation

seemed to open her eyes to new possibilities and potential activities with which to live her life purpose in a more meaningful way.

*Purpose may help to accept loss.* Having an identified purpose in life helped some people to let go and accept loss. While I discussed that some people seemed to have a better defined purpose than others in the previous section, it seemed anyone who latched onto a purpose of some sort found a way to move through a loss and transition. Simply having a reason to get out of bed in the morning was a way for some to keep moving through life, and deal with the loss or transitions they faced. Purpose in some cases seemed to fill a void that was left by the loss of a relationship, a spouse, parent, a previous identity or a feeling of being valued.

Judy embraced writing as a way to get through her traumatic experience of exercising her husband's living will. She found that blogging and writing books about the experience not only helped her sort through and name her emotions, but made her feel valued in that she was helping others who faced similar decisions. In a straight forward manner she stated that without her writing she did not feel she had any other reason to get out of bed most days.

Kate let go of her grief in losing her endeared mother when she realized she could "spread herself around to many other family members in need." She became the organizer of the family functions and labeled herself as the "go to gal" for any family member with a problem. Kate found that re-directing the love she had for her mother to helping family members in a similar caring way allowed her to let go of the loss of her mom.

Lois learned to let go of expectations she had about her son and new grandchild. She moved back to Minnesota and sought out ways of re-engaging in a caregiving role that could fill the void and rejection she felt from her son. While she felt crushed and confused, Lois found that

staying true to what she knew she was born to do, like caring for others in a holistic manner, allowed her to move forward with her life after a very heart wrenching loss of relationship.

Both Ed and Jay attempted to re-create meaning in their lives by getting involved with organizations in retirement. Becoming frustrated when they did not get the results they wanted, they both questioned what value they brought to society in retirement. Ed claimed that no one wanted to listen to “an old man” and Jay figured that if his ideas were not accepted by a group it was “their loss”. Both men seemed to be stuck in the grief and transition of retirement even though they thought their ideas would help them continue to live purpose filled lives. When Jay decided that he was the one that needed to change, and let go of his expectations, his outlook brightened as he realized that there were many other organizations he could associate with. His thought then turned to the possibility that it might take the right organization at the right time to find his ideas useful.

***Purpose useful to move on in transitions.*** Those with clear purpose and passion for what they did often moved more easily to the next meaningful activity, job, or relationship using their purpose as a guide. This study demonstrated that transitions of all kinds happen at different times in life with or without the ability to prepare. But I also learned that those with a clear definition of purpose seemed to move to the next endeavor more seamlessly than others. Debbie, for example, spoke about constantly being laid off, fired or having to look for a new group to work with when funding ran out for her program. However, she continually moved to the “next thing” by recognizing that she wanted to work with people who had trouble adjusting to American society. She said that every time one project ended, she was hurt and depressed but knew that she could find another opportunity similar to what she was doing before. This kept her moving forward through transitions.

Robin used her purpose of “making connections” to move easily between acting, fundraising and educating at a nature center. She said learning from her early days as an actor that connecting people to a story was fulfilling for her. She went on to connect people to dreams through her creative fundraising and later connected children to science at the nature center. Robin said that by focusing on “things that made connections” enabled her to not dwell on the past but to move on to the next thing.

**Theme III: Transitions can involve several components of loss which sometimes need to be addressed separately.** In addition to retiring, the loss of caregiving was a common transition for many of the study participants. Those who discussed their retirement transition spoke about how they moved on from daily interaction with co-workers, a sense of being productive and having a place where people listened to their ideas. A few participants spoke about feeling stuck after the death of someone they were caring for. In most cases, the death of the loved one was expected, and yet, the caregiver talked about really feeling lost when the caregiving role was over. It seemed that while the caregiver grieved the loss of the relationship they neglected to address the loss of “feeling needed” that came from being a primary caregiver.

***Retirement losses.*** Retirement transitions may involve loss of role and relationship. While there were not any participants who claimed they missed going to work every day, some did discuss the loss of feeling productive or energized by associating with other people at work. It seemed that the joy of no longer working also brought the anxiety of having to adjust to not being part of a social setting anymore. The participants seemed to be able to address parts of the retirement transition but struggled with others.

- Flo did not miss the work and kept friends from her old job, but struggled to find meaningful activities outside the framework of her organization.

- Mary made a point of continuing relationships with co-workers, and stayed connected to work to maintain a sense of feeling needed. She decided that completely letting go of her work in the district would be ok for her, but was stuck in not knowing what other activities to focus her attention on.
- Jay let go of relationships at work but was challenged in replacing the role he enjoyed as a systems thinker.

*Caregiving losses.* People can get stuck in the grief of losing a person close to them if, as a primary caregiver, they do not address the loss of both role and relationship. Kate enjoyed caring for her ninety-nine year old mother and was deeply saddened when she died. Kate became so despondent that she lost her joy of work and life. Kate quit her job and focused on settling her mother's estate for the next year. She said she knew that her mom was going to die but assumed that she would be able to get on with life afterwards. Moving on was difficult for Kate, however. Although she missed her mom it was not until she replaced the caregiving role with spreading her 'active love' to other family members that she felt fulfilled again.

Jessie spent a great deal of time with her mother in hospice care until she died. Jessie said she moped around for quite some time until she attended the Purpose Project and labeled her purpose in life. With a new found energy, Jessie moved through various activities and organizations that supported her purpose. Moving on with her life allowed Jessie to move through the grief of her mother's death.

**Theme IV: The development and dissolution of relationships can be affected by one's recognition and desire to live a purpose led life.** As people retired, pursuing personal interests became a more predominant way for them to spend their time. Many people had identified themselves with their work but absent their job, personal interests became their life.



Many learned that away from the workplace, some relationships had no other commonalities. The same was true for some relationships outside of work. As people spent more time pursuing personal interests that were meaningful, even friendships outside of the workplace dissipated. While the definition of friend can mean different things to different people, many described friends at work to be something more meaningful than just a work associate or colleague.

*Sharing purpose with others.* As some found purpose to be a larger part of their daily life, they consciously migrated to new friend groups. Richard began enjoying more time with people in his church who shared his passion for Cursillo and prison ministry. He said he did not associate much with co-workers anymore as they no longer shared a common interest.

Lois and her husband started doing less with friend groups they had for years. They started socializing more with people from their church who shared a passion for meaningful work towards others. Lois consciously made the change, she said, because she had fewer common interests with the old friend group who appeared content just spending time traveling and visiting grandchildren. While she still spoke to the old friends, she felt that talking about the meaningful work she was doing in the church might be seen as bragging.

Rose decided to expand her friend base to include some who offered different views, opinions and ideas than her current social circle. She recognized that her friends, much like herself, were driven, striving and focused on accumulation of things. She still enjoyed that friend group, however, when Rose realized that people were the most important thing to her, she decided to spend time with people she considered to be different than she was. Rose said she found these new friends refreshing and interesting.

*Relationships with co-workers.* The study revealed a wide range of experiences for the various participants' continued relationship with former co-workers. Jay found that those he

considered friends at work were really just being friendly at the time, and did not express an interest to continue a relationship once he retired. Mary maintained friendships with fellow teacher and administrators. She learned during her second year of retirement that staying involved with the school district was not a necessary requirement to continue her friendships. Flo found her relationships with former co-workers flourished in retirement. She realized conversations became more interesting when she talked to former colleagues about more personal matters and not talking about their common work.

In each of these cases, the study participant was still searching for more meaningful activities and made an attempt to maintain relationships with co-workers. It seemed that those who had not found new ways to live out purpose in their life did not establish new friend groups.

While Debbie was still searching for a more balanced way of living, she identified with a strong sense of purpose of helping minorities and the elderly with adjustments to new ways of life. She joyfully spoke of a close group of friends that were also, at times, co-workers. She stated that her friends effectively supported each other and shared ideas of new ways to create organizations or businesses that helped people plan for the care of their long term health. By living her purpose, even in her current work, Debbie stayed connected to those who shared her passion.

***Relationship with self.*** As participants reflected on what they found meaningful in life, they also learned more about what they valued and desired for themselves. Many went on to say that understanding self led to simple actions that they found fulfilling.

- Judy realized that she never had friends and in order to have them now, she had to learn how to be a friend.
- Dewey realized that he needed to develop a personal philosophy.

- José decided to identify himself now as a writer and not a professor.
- Luda felt she now wanted to live with others, something she rejected in the past.
- Mary became protective of things she could do to care for herself.
- Kate started to exercise and attend Mass but wanted to do it alone.

Part of connecting with self seemed to be letting go of beliefs people felt were no longer useful, needed or productive.

- Jay learned that he would be happier if he let go of his expectations of others.
- Lois let go of her expectations of her role with her new grandchild.
- Rose realized that stuff was less important than people and started to de-clutter her life of things and activities that were no longer useful to her.

*Relationships with family members.* The research revealed a curious absence of deepening relationships with family members in retirement. Many participants spoke about the role of their spouse or other family members in their retirement transition. While often mentioned, few spoke in any depth or excitement in sharing retirement with their spouse. It seemed that most of the study participants that were focused on what made their own life meaningful wanted to share their passion with others. However, they selected friends and fellow church members, and often excluded those closest to them.

Dewey discussed the fact that the way he spent his time would likely change once his wife retired. He was certain that she would want to do some things, like travel, that he was not interested in doing. Dewey had already prepared thoughts to discuss with his wife, once she retired, about what he was willing or not willing to do with their time together.

Mary's husband retired but then returned to work full time. She sensed that retirement would be different when they both retired full time but did not discuss any plans to seek out meaningful activities with him.

Lois shared some activities at her church with her husband, but also said he felt neglected because she was so involved with her parish nursing. While she knew of his feelings, she expressed no desire to change them.

When Kate no longer had her mother to tell her that she was wonderful, she sought out a friend, and not her spouse or a family member to replace her mother's support.

Debbie felt stuck getting into her next purposeful venture as she said neither her husband nor family supported her. She claimed they did not really understand what she was trying to do and that was the reason for their indifference.

José wondered if his wife was jealous of his newly experienced freedom from driving into work every day, but did not care as he really enjoyed staying home to write.

**Theme V: Organizations can play an influential role in an individual's pursuit of living a purpose filled life.** This study showed that organizations can be the framework to help an individual live out purpose in their life. However, the study also revealed situations where organizations seemed to hinder an individual's pursuit to live, deepen or explore purpose driven experiences. In some cases, people made a conscious decision between living a more meaningful life and remaining employed.

*Purpose defined in organizational roles.* For some, an organization provided the framework, people or situation for purpose or meaning to be exercised. Jay was a systems thinker who liked to work ON organizations rather than IN them. His career in human resources allowed him to work in that fashion. He said his opinions and ideas were valued by others and

he provided an example of a successful project he was especially proud of. When Jay tried to re-create systems thinking in retirement, he became involved in organizations he felt could use some help. He felt rejected when he could not work ON these organizations the way he wanted to. He learned that unless you work for an organization as an employee, it is difficult to provide advice and counsel to help an organization operate more effectively.

Flo had an easy time working with people and getting to know their interests. To help people reach their potential, her purpose in life, she often researched areas that her colleagues and direct reports showed an interest. She enjoyed helping these co-workers investigate and learn new things. Now retired, Flo felt she had less of an influence on people due to less daily interaction. She tried to re-create her purpose working with nieces, nephews and other family members but stated her research and encouragement did not have the same effect.

Mary enjoyed the mentoring aspect in her role at work and was challenged to find activities in retirement that provided the same level of fulfillment. Staying on as a part time employee provided her continued opportunities to mentor and coach younger teachers and help them develop.

Dewey thrived within the structure of his organization in the military but felt lost after he retired. He did not have the influence on people or strategy the way he did during his employment. While he did not miss the career or the organization, Dewey still was searching for an elusive part of retirement that he could really embrace.

Robin could easily make connections for and with people during her roles in acting, fundraising and at the nature center. She hoped to do more things with family and friends and construct new connections. However with her children grown and parents aging, she found it

difficult to connect with anything in retirement that gave her the same level of satisfaction and fulfillment as her previous work.

*Organizational roles as constraints to purpose.* For some, an organization became a constraint in which to exercise, pursue and deepen purpose in life. Rose chose to no longer practice law which she felt restricted her desire to problem solve. She felt her job and the industry had become mired down in regulatory issues which caused her to focus more on regulation enforcement than on practicing law and problem solving.

Lois no longer wanted to be a registered nurse when she was unable to treat patients in a holistic manner the way she was trained. She recognized a drive by health providers to keep costs down by cutting staff. As a result, Lois felt she had too many patients to treat on a single shift to make a difference with any one of them.

José left his tenured professor position when the university moved a larger portion of the curriculum online. His desire was to teach his subject in the classroom and felt he could not provide the same level of quality instruction online.

Jackie left her position as a psychologist as she grew frustrated in the limited ways she legally could treat patients. She said it became increasingly difficult to get approval from the state board to utilize patient treatments that had not yet been approved. Also, she wanted to provide patients an opportunity to change in a short period of time if they wanted to, but felt her industry pressured her to keep patients in therapy longer than needed.

## **Chapter Five**

### **Discussion**

I was interested in learning about the experience of individuals as they entered or passed through an age in life when many people chose to retire. Having worked with thousands of individuals and couples preparing for the financial aspects of retirement, I also learned about the stories, dreams, fears and anxieties each of them faced. After attending a Purpose Project workshop at the University of Minnesota's Center for Spirituality and Healing in 2009, my interest was piqued as to how people learn about and live with meaning and purpose in their life in retirement. Therefore the purpose of this study was to gain a deeper understanding of what people learn when they strive to live with purpose in life during a transition into retirement.

My research question was: What do people in or near retirement age, who have participated in a purpose defining program, learn about life and themselves? I focused not on the Purpose Project itself, but rather, the experience of people before, during and after the workshop. To answer this question, I conducted an interpretive multi-case study by interviewing sixteen individuals, between the ages of fifty-five to sixty-eight, who attended the Purpose Project workshop. To gain access to these participants, I worked with the University of Minnesota's Center for Spirituality and Healing, the host of the Purpose Project workshop. The Center sent an email to all who attended the workshop over the past ten years. Interested individuals contacted me directly to set up an hour long interview.

This final chapter includes discussion of the major findings, limitations in the research, suggestions for further research, implications for the practice of Organization Development, and personal reflections about the study.

## Overview of Major Themes

Five major themes emerged after the cross case analysis of the sixteen individual case studies. The major themes were:

- People who were able to self-reflect, seemed to have had greater success in the identification and practice of living a purpose filled life.
- Some people found value in knowing their purpose when they faced transitions in life.
- Transitions can involve several components of loss which sometimes need to be addressed separately.
- The development and dissolution of relationships can be affected by one's recognition and desire to live a purpose led life.
- Organizations can play an influential role in an individual's pursuit to live a purpose filled life.

**People who were able to self-reflect seemed to have had greater success in the identification and practice of living a purpose filled life.** Upon analysis of the sixteen individual case studies, three distinct groups of people emerged. One group was very clear in what provided their life meaning and purpose, and their stories suggested that finding purpose involved self-reflection over a number of years. People in this group demonstrated an understanding of what was important to them by making decisions to pursue purpose in life, often by moving away from their career. A second group claimed they were still searching for something more meaningful in their lives. Although they had not identified ways to live purpose on a daily basis, many in this group provided examples of characteristics and interests they had learned about themselves since they retired. Interestingly most in this second group qualified for retirement through a company sponsored pension, and did not have an organized plan for



pursuing activities and interests outside of work. A third group was frustrated in their attempt to find meaningful activities in retirement. No one in this group discussed spending any significant amount of time learning about themselves. Their stories centered on the groups and organizations they tried to associate with after retirement and the frustration and despair they felt when their actions led to unfulfilling results. A few of the participants in the study either did not fit into one of these three groups completely, or shared characteristics of more than one group. For example, four of the participants seemed to have identified what was meaningful in their life, but struggled to find ways to live out that meaning. In those cases, I used their story to support the findings in more than one group.

The marked difference among these groups centered on success and time spent reflecting on the meaning certain activities and organizational involvement brought to each person individually. Those who could delineate what they loved about an activity seemed to be living a more purpose-filled life than those that looked solely at the activity itself to bring them meaning. For example, some people may enjoy writing or reading poetry. However, each person may love poetry for different reasons. Some may find poetry peaceful and calming, while others may find it inspiring, thought provoking or a creative way to share a message with others. Those that are able to ascertain what makes their experience with poetry most enjoyable may be better able to transfer what they love about poetry to another part of their life. Taking an extra step to reflect on what exactly a person finds meaningful in an activity may make that activity much more fulfilling, and provide an opportunity to find other ways to duplicate that feeling in other ways. In summary, knowing what one loves about something is more useful in finding other purpose related activities, than just doing something one enjoys.

But how does a person learn what they enjoy about an activity? I relate this exercise to a person deciding their favorite color. No one can tell you what your favorite color is; only you know. Similarly what one finds meaningful about life can only be found inside oneself.

Looking inside oneself for meaning and purpose is not a new concept. The Ancient Greek philosophers Plato and Socrates often used the theme “Know Thyself” when describing how characters have come to understand their beliefs and gaining wisdom (Sani, 2008). Crumbaugh and Maholick (1964) stated that meaning is the “ontological significance of life from the point of view of the experiencing individual.” (p.201) In Maslow’s paper, *A Theory of Human Motivation* (Maslow, trans. 1943), he stated his famous “Hierarchy of Needs” that revealed a person has basic needs in life, such as securing food, shelter, security and then a sense of belonging. Once those basic needs are met, a person can begin a process of “self-actualization,” which is becoming all that one can be. All of these works describe one’s inner-directedness to find meaning by assimilating feelings, emotions and ideas into knowledge of self. This internal analysis helped study participants uncover wisdom, truth and purpose in their lives.

The inner-directed reflection process was not as simple as sitting down one day and thinking about what is important to oneself. Reflection took time and effort. Reflection involved reviewing past experiences, deciding what the experience meant and how it affected oneself. Settersten (2002) wrote that to effectively conduct a reflection of meaning in one’s life a person must use the lenses of a psychologist, sociologist and theologian. Those who felt they found meaning for their life spoke about the seminars, workshops and often years of reflection about feelings of various experiences they had to understand what made life fulfilling.

Finally, those with a clear understanding of purpose in their life made choices and decisions using purpose as their compass. Leaving a successful career to pursue activities where

purpose could be achieved in a less-constrained manner, demonstrated the power of a desire to live a life rich in purpose.

**Some people found value in knowing their purpose when they faced transitions in life.** While this study focused on the transition of retirement, many other transitions surfaced through the participant's stories and descriptions of their experiences. The transitions spanned a wide range of losses including job, spouse, parent, identity, health, beauty, activities, relationships and relocations. Transitions were planned, unexpected, eventful, meaningful, casual, ordinary and complex. However, despite the variety of transitions and how they occurred, patterns emerged that demonstrated the value of understanding self and purpose to help navigate a range of emotions and experiences in transition.

Kirkegaard stated: "We live life forward but understand it backward" (Kirkegaard, trans. 1846). Some participants described the identification of purpose and how it helped them understand their emotions, decisions and actions during experiences of the past. I found that when past experiences were analyzed and understood, people learned to accept their emotions and actions from that time in their life. In some cases experiences of the past that were confusing or hurtful at the time were now embraced. Further, a newly found sense of validation helped people move consciously through newer transitions, and helped create a vision for future actions.

In addition to making meaning of specific past life events, life reflection is essential as a turning point from the first half to second half of life (Jung, 1976). Jung (1976) also found that while a person developed a personality to fit into their particular environment in the first half of life, described as an age range of about thirty-five to forty, the second half of life required an inward reflection to help balance inner tension. The reflection allowed the second half of life,

defined as after age thirty-five to forty, to integrate one's life to a more authentic and whole self. This study demonstrated cases of inner reflection where the authenticity of meaning and purpose in life was found.

Butler (1963) introduced the life review process and described it as a way to raise consciousness of past experiences and often resolve prior conflicts. He originally observed life review processes as people prepared for death, and sought resolution for certain events in their life. Erikson's (1963) *Stages of Psychosocial Development* also discussed the mature adult's need to reflect on life to gain a sense of fulfillment and wisdom. Like Butler, Erikson's model posited the need to reflect as a person entered the final stage of life, which ultimately ends in death. Staudinger (2001) separated the concept of life review from reminiscence. She posited that while reminiscing involved the recall of memorable past life events, a life review adds an element of meaning to those events. Life review in this context is a tool used to help a person heal, resolve conflict, and use the meaning from a past event to develop grow, and move forward.

When faced with current grief or loss, purpose often provided a way to move through the transition. Much has been written about the struggle of individuals to detach from a relationship, identity or way of life. Marris (2002) explained that dealing with the bereavement of a job loss, death of a loved one or moving on from a known way of life required making sense of the loss. He wrote:

In the process of grieving, the past is consolidated: although the relationship is lost its meaning is redefined and reinserted. Once it is possible to feel that the past cannot be snatched away, that its meaning is secure, the bereaved can begin to abstract from the relationships a meaning that can be reformulated to guide the present...The bereaved have to recover purpose, worthwhile to them, that the future can fulfill. (p.19)

Bereavement and transition can create uncertainty of the future. Because people may require certainty in order to move forward in life, they look for ways to feel comfortable with what lies ahead in life. Knowing one's purpose can be used as the tool to create that certainty.

**Transitions can involve several components of loss which sometimes need to be addressed separately.** The study revealed that death of a loved one, retirement and loss of caregiving were three of the more prevalent transitions people faced. Each of these transitions involved several different components that could require its own detachment process. For example, death can involve not only the loss of relationship, but loss of family income, companionship, sexuality, or security. Retirement seemed to be a very multi-faceted transition with potential loss of stable income, identity, daily structure, social status, and relationships.

In this study several individuals found value in their life by providing care for others. It was with this group of caregivers where components of loss, such as role and relationship, really stood out. I found that the death of a family member, formerly cared for by a study participant, often paralyzed the caregiver. The death involved not only the life of a loved one, but the death of a meaningful role for the caregiver. Participants were perplexed by how stuck in grief they felt, even when they knew the death was imminent. I found that loss of the role as a caregiver was often not addressed, causing the person to be stuck in the grief of the transition. In some cases, once a new purposeful activity or way of life was uncovered, the participant was better able to let go of the death.

In addition to the aforementioned value of understanding the potential loss of role and relationship when a caregiving role ends, caregivers could strive to maintain balance in their lives. In addition to "having something to go back to" when a caregiving role ends, it appeared

that the majority of caregiving participants in this study found they were not caring for their own needs when immersing themselves in the care of another.

Rhoades and McFarland (2000) studied purpose in life specifically for professional caregivers. They found that while those who care for others reported a feeling of strong meaning in life, many neglected caring for themselves. Their study also found that because caregiving was an “other-oriented” action, many caregivers led a more purposeful life than the population but lacked self-awareness for their own needs. These findings are similar to what was found in my study. Five of the participants in my study spoke about how deeply fulfilled they felt by taking care of others, however were conscious to the fact that they were out of balance in their own life.

Identifying and living purpose in life seemed to help those grieving losses other than caregiving. Study participants discussed losing their job, spouse, parents, health and recreational activities. While some found their grief passed over time, others found themselves unable to accept the loss or became fearful of future impending losses. Papa and Maitoza (2013) studied the experience of grief in the instance of job loss. They posited that loss of a job, especially in a role the individual held as self-defining, can cause a comparable level of grief to losing, in death, a self-defining relationship. Papa, Lancaster, and Kahler (2014) compared grief of people who suffered a loss due to death to other types of losses such as job loss, divorce, relationships, and others. They concluded that engagement in “self-defining activities” helped people move through grief regardless of the type of loss they had experienced. Further, such activities can be useful grief management tools regardless of a loss of a role or relationship, or both. Other research suggested that grief in job losses sustained by retirement were mitigated by activities that maintain self-worth (van Solinge & Henkens, 2008).

**The development and dissolution of relationships can be affected by one's recognition and desire to live a purpose led life.** In addition to meaningful activities this study included an analysis of meaningful relationships. As people went through transitions, their focus on purpose sometimes affected relationships with family, friends, spouse, former and current co-workers and self.

Gaining more unstructured time in retirement often led to more emphasis on relationships. Some participants sought out new friend groups that aligned more with their personal values and purpose. In an organization, people are by design working towards a common something. When people remove themselves from that work community, they may seek out a new purpose aligned community. Mourkogiannis (2007) wrote: "It is easy to overlook purpose when searching for a job, but no other factor may be as important; working with colleagues whose moral ideas resonate with your own can help you find fulfillment in life..." (p.41) Therefore, some study participants were looking to replace a meaningful community of people that they lost by leaving their organization. Some participants realized that meaning was not shared by their current friends, so they sought new friend groups.

Migrating or creating new friend groups may also stem from the intrinsic need to feel valued. When we feel that we make sense to others, we make sense to ourselves (Weiss & Bass, 2002). By associating with others who shared a common interest, people felt that what they believed in mattered, and consequently that their actions and activities mattered. For example, car enthusiasts feel valued by interacting with other car enthusiasts.

In addition, people looking for new ways to live a life of meaning may be looking for ways to connect to new things (Schlossberg, 2009). Therefore, associating with a new group of people may open the doors to new meaningful adventures. Schlossberg (2009) wrote about

revitalizing relationships by replacing what was lost at work through new communities, associations and people she called “connectors.” Further, investing your “social capital” in other people may lead someone into new interests and meaning. She wrote:

The retirement transition brings the issue of mattering into clear focus. In many cases, the huge role that work played in our daily life becomes clear only after retirement...The loss of substance and challenge of the work itself, our relationship with colleagues, the connection to a physical environment...can leave a gaping hole...causing people to wonder with so much newfound spare time, whether they matter anymore. (p.27)

Retirement, and other transitions, can also lead to new connection to self. This study found evidence of participants’ recognition of new interests, new beliefs, as well as a desire to let go of parts of an old self. The reflection used to identify ways to live purpose in one’s life may also raise the awareness of what are the most important things in life, where voids may exist, and what one knows about oneself.

Some found the retirement transition very personal, and although they may have experienced changes to relationships, most of what was learned was found internally. Even in situations where participants felt a strong partnership with a spouse or family, they commented little about others’ involvement in what they had learned about themselves. While most of the learning appeared to be self-recognition, many commented on the value of sitting with strangers at the Purpose Project workshop. I believe the reason for this is twofold. First, study participants enjoyed hearing about the challenges of others in the retirement adjustment, and felt gratified in comparing their personal situation to the struggles of others. When they heard of the challenges and fears of others, study participants felt validated in their own fears. Second, with many commenting on the deep personal nature of retirement, it appeared that sharing fears, discomfort and uncertainty with strangers was easier than sharing with one’s own family or friends.



**Organizations can play an influential role in an individual's pursuit of living a purpose filled life.** The study revealed an interesting dichotomy of how organizations can support or constrain an individual's desire to live their purpose. Some participants found that the regulations of the industry or particular organization they worked in did not allow them to perform their job the way they wanted. These participants left their organization. Other people lost the framework in which to exercise their purpose when they retired from their organization. They struggled to find another arrangement in retirement that provided the same opportunity to live their purpose.

While the difference between the two appeared to be the awareness and self-reflection of the former group, the impact to the study is greater than this finding. There are two larger questions stemming from this result. First, is when employees (study participants) identified a deep meaning in their life, why could they not find better opportunities to live their purpose within their current organization? Second, why could the retirees in the second group not find a new organization to do meaningful work? I find the answers to both questions could lie within the organizations themselves.

Wise organizations want to retain valuable employees, especially if they have decades of experience in the industry. With insight and effort to learn what work is meaningful to these employees, an organization may not only benefit by keeping them employed, but perhaps could arrange employees into more ideal positions. Providing purpose seeking tools and workshops within the organization may help employees identify what they find as meaningful work. Employers could then use the information to keep their employees in meaningful work roles wherever possible. In addition, by helping employees identify with meaning in their work, it could help to build a stronger community of support within the organization. Essentially, if

employees feel they share meaning in their work with other employees, the organization may greatly benefit and the work product could improve.

For employees preparing for retirement, providing them access to tools, information and workshops about purpose in life may create goodwill within the organization, and keep experienced employees until they retire. Current employees would benefit from learning the value of staying with a company for the retirement assistance programs. Finding ways for former employees to continue meaningful work within their communities would also add to the benevolence and goodwill for organizations within their community.

Finally organizations could benefit by helping employees learn and grow as people as well as employees. While some employees may be motivated to move UP the corporate ladder, others may be inspired to grow OUTward in their current positions. Growth of employees does not have to be about the continual advancement of position, role or responsibility (Chalofsky & Cavallaro, 2013).

Kets De Vries (2003) studied executive level leaders retiring from their positions. He found that these leaders often struggled with letting go of their power, position and meaningful work. Leaders reflected on the personal sacrifices made to execute their position and because of this pushed off their retirement. Kets de Vries (2003) stated:

Companies have an obligation not only to the bottom line but also to the men and women who work for them...In most companies, unfortunately, retirement planning is viewed largely as a personal concern, and management provides little to no feedback or guidance...Retirement policies should be enabling, allowing executives to address the adjustments they need to make when counting down to retirement...People on the verge of retirement are all too often abandoned to sink or swim (on their own), with no help or preparation from the organization. (p. 715-716)

### **Other insights to the study**

There were other insights gained from this study that I will highlight here. It appears that the financial aspect of retirement planning was prominent but quickly dismissed by study participants. While many spoke about evaluating their financial plan for retirement, the majority seemed cavalier in their worry or concern about money once they retired. Comments made by participants led me to believe that if they felt their financial plan was secure, they were able to focus on other parts of retirement. I find this significant to the financial planning industry that seems fixated on the notion that retirement is all about the financial plan. I feel this study effectively added the need to plan for purpose into a comprehensive retirement plan. The group of participants who “qualified for retirement” by starting their pension under age sixty, seemed very unprepared for the post-work years. Those pension eligible retirees in this study said they were financially secure but actively searching for a more meaningful way to live life.

What also struck me as interesting were the comments from Judy and Lois about the impact their attorney and financial planner had on their lives. Judy’s attorney suggested to her the emotional side of executing a living will which served as very helpful insight when she negotiated the extremely emotional decision to remove her husband from life support. I observed the gratefulness in her voice and face and could picture the meeting with the attorney taking place. Lois’ financial planner emphasized living a meaning filled life in retirement. She also exhibited a voice inflection and facial expression that revealed a deep appreciation for the financial professional who seemed to care about her clients in ways that did not directly relate to generating revenue. Both Lois and Judy mentioned the special value these two individuals had on their life by “doing that little extra” which, at the time, seemed to be out of the norm. These two examples made me feel proud to work in an a field that can have such an important impact on people.

I was moved by the number of comments that referred to the value of slowing down life and living in the present. As stated in some of the individual case studies, when people realized that they had more past than future, they seemed to start to grasp the reality of their own mortality. When retirement was no longer a future plan, but rather a current action, it seemed to instill a living for today type mentality. When people started living for today they found more meaning in their own life, in their relationships with others, as well as a sense of wanting to give back to their communities.

One foundation of this research was the search for purpose in life as people age and retire to their family and community. José's story spoke to the value of elders in the communities of several cultures. Leider (2004) also wrote about how some cultures look to the older members for advice, wisdom and leadership. I found it curious that none of the other interviewees spoke about feeling valued as a member of their community or family simply because they had aged. It seemed that all of the sixteen people interviewed felt they had to provide service to their family, through activities such as caregiving, or actively search for purpose in their community.

Rose's comments about finding purpose in life as developing who she was, versus, what she does, was very interesting. None of the other fifteen interviewees articulated this concept. However, it would seem that the success of self-reflection for so many interviewees would have led them to the idea of being versus doing as well. It appeared that purpose continued to be about the work people performed rather than being known for who they were.

Finally, I was amazed at the amount of literature that discussed the value of living a purpose filled life but so many of the participants in this study struggled to find ways to live with purpose. It seems from the amount of research performed that finding purpose is very valuable to people, but for some reason the ability to find and live a purpose filled life is not widely

found. Out of the sixteen people interviewed, only five had found a deep purpose in life that they were able to live on a daily basis. While others identified purpose or had some sense about how purpose played out in their life, the majority of those interviewed still wanted more in life. They were becoming self-aware without actually realizing that was what they were doing. Considering every person identified in the study attended at least one purpose seeking workshop, there was still frustration, confusion and continued uncertainty on how purpose can be found and how incorporate it into everyday living.

### **Limitations**

There are several limitations that should be considered with this study. As an interpretive multi-case study, the findings may not be generalized to a larger population (Stake, 1995). The participants were asked to self-report on purpose and meaning in their life, which may not have revealed some of the thoughts or feelings. Participants could mask their actual feelings consciously or subconsciously without an accurate way to triangulate the data. I had to rely on only the words, mannerisms and physical reactions of the participants themselves. As the participants were volunteers out of hundreds of potential candidates, they may have come to the interview with a particular story or perspective they wished to share.

All sixteen participants interviewed resided within one-hundred miles of Minneapolis, and lived and worked in Minnesota the majority of their life. All participants worked in what most would consider professional white collar type positions, inclusive of education and caregiving, and none reported to work in labor intensive professions. Many cases described situations where a spouse also worked and provided financial support. It was indicated by some that had their spouse not provided income, the participant's decision to retire early to pursue purpose in life may have been delayed or avoided altogether. Additionally, no one spoke of

being impoverished or experiencing financial hardships. Therefore a decision to leave a paid position for a volunteer or lower paying position could have been more feasible if financial constraints did not to be considered.

While each of the participants had experienced the Purpose Project workshop, some had taken additional or follow up seminars while others had not. For those with additional exposure to a purpose led life through sequential workshops may have developed more reflective tools than others. In addition, the time since taking the workshop varied greatly from within a year or two, to over five years or more. Therefore, some were able to recall details more clearly than others on exercises and impactful experiences from the Purpose Project workshop. Finally, while some participants had retired recently, others had retired for some time and may have had more experience to speak about their retirement period.

### **Implications for Organization Development**

While the focus of this study was on individuals in their retirement transition, several other related opportunities were observed. Many participants wished they had considered purpose in life much earlier than they had. Schools, universities and religious organizations could help people broaden their experience of meaningful work from the workplace to communities and charitable organizations. Teaching students to find purpose in their decision making may provide better direction and clarity in following meaningful activities throughout their life.

Corporations, communities, religious and other organizations can bring purpose seeking skills through education, workshops and access to life coaching. Opportunities exist to help people learn to self-reflect, evaluate the meaning of past decision and events as well as learn to

slow down their lives to consider what is truly important to them. This education could allow people to align their personal purpose with organizational purpose and needs.

Organizations could also demonstrate the value of employees growing outward versus the striving need to be promoted up the corporate ladder. Reflection and discovery of self may create a healthier, more engaged workforce that can find ways to expand their personal impact to the organization by finding more ways to demonstrate meaningful work in their current roles.

Organizations can address a clear need to help people through life transitions. Certainly many work hours are lost with employees struggling with personal events such as family illnesses, personal depression, death, divorce, and disabilities. Helping people understand the components of losses, and the ability to leverage meaning in life to help move through the grief process would benefit all involved.

Finally, opportunities exist to assist employees in planning for all aspects of their retirement. Most companies offer financial assistance through qualified plans such as 401(k)'s, but might they also offer life planning skills? I learned through this study, and others like it, that if left to their own devices some people struggle with retirement transitions. Also, those who did find purpose on their own often left their organization or industry! Therefore organizations and people could equally benefit by identifying an individual's purpose in their life and planning their retirement in a more thoughtful and prepared manner.

### **Future Research**

The results of this study raised many questions of my own interest that may also interest other researchers in organization development. I found that purpose was useful in moving through transitions in life but that many losses involve several nested components that may need to be grieved separately. Additional research could look specifically at the relationship between

purpose and how it may move people through some components of a loss or transition but not through others. For example, a study could be performed on separating role from relationship in the loss of caregiving, and how purpose might help move someone through one but not the other. In a related idea, it seemed that purpose in life helped the grieving process for some losses but not for others. I found that the loss of certain activities, such as health or physical capabilities were in many cases more difficult to let go of than others such as job losses or even death. While the argument of breaking some losses into components might be useful, perhaps there are other reasons why people cannot let go of certain losses.

A broader population could also be studied in a similar manner of multi-case study. By interviewing individuals who had NOT taken the Purpose Project workshop, might the results have been different? I wonder to what extent the words purpose and meaning would be common language to the majority of people who have not participated in such a workshop. Also, the study could be conducted in other parts of the country, within other cultures, or employed as a cross-section of individuals from different states. Studies could also be directed towards people working in commonly known, labor intensive, blue collar jobs such as those in plumbing, construction, or manufacturing. Research into the effects of purpose in life in men versus women in retirement could also be studied.

While an effort was made to focus on the overall experience of people in retirement, another research idea would be to evaluate the effectiveness of the Purpose Project workshop, or others like it, by conducting interviews before and after the event. The study may reveal what people learned about themselves and life as a direct consequence of the workshop itself.

Future research may also include a study of the effect of searching for purpose in retirement as it relates to spouses and partners. While many individuals were married and briefly



mentioned a spouse or partner, very few spoke about the value of partnership as a purpose in life. A deeper look into the effect of a partnership and purpose in life might be of interest to other researchers.

## **Conclusion**

Living a life with purpose and meaning involves two actions. First, a person needs to identify what gives their life meaning. Secondly, a person must find the activities, relationships, or organizational involvement to live out their life's meaning. Finding purpose in one's life is a personal journey. While all sixteen study participants attended a one-day Purpose Project workshop, only five seemed satisfied that they were living a purpose filled life. Five other participants claimed to have identified what gives their life meaning but were challenged to find a healthy, balanced way to exercise purpose in retirement. The difference was the ability to reflect on and pinpoint what it was about a certain job, activity or involvement that gave one's life meaning. When that "WHAT" was identified, success was found in the ability to transfer the love of something to something else. Those who simply continued to look for a specific activity or group to provide meaning were frustrated, unsettled or feeling anxious.

In addition to retirement transitions, study participants described challenges in job loss, death, health and personal appearance changes, and the loss of roles such as caregiving. I found that all losses can have various components of loss nested into a single transition. People were sometimes able to let go of certain parts of the past but struggled with others. Those with an identified purpose seemed to have a much easier time moving through transitions by finding something meaningful to move forward with.

The pursuit of meaning in life affects relationships. I found that people gravitated towards groups and relationships that shared a similar purpose in retirement. The journey of finding

purpose also strengthened their relationship with themselves as they learned about what was important in their life, and that they mattered.

Finally, organizations can sometimes constrain an individual's purpose or conversely provide the framework for living with purpose. There exists tremendous opportunity for schools, churches, communities, charities and employers to help their members identify and live lives filled with purpose. Not only will the individual benefit, but this focus could create more harmonious and effective organizations.

### **Personal Reflections**

I found this research very satisfying and validating on a personal level. In 2002 when I chose "Facilitating Change" as my calling card during a Purpose Project workshop exercise, my life started to make sense. Reflecting at that moment, I then realized the reasons I made several personal and professional decisions in years past. I kept that card close and have used it ever since as a guide to understanding who I am, what I enjoy doing, and why I make the choices that I do. That was my first experience with self-reflection.

In 2009, the financial crisis took a devastating toll on the financial services industry and I found myself in an unique situation of being employed but without a job to go to every day. As our firm made decisions on how to survive its own crisis I was afforded an opportunity to slow down my life and explore my professional interests and passions, while still collecting a paycheck! However, I felt very stuck and lost as I felt my identity, personal value and the majority of my friendships were part of my job. That six month long hiatus provided me the time to take a healthy look at how and where I wanted to rebuild my life.

After attending another Purpose Project workshop in 2009, at the Center for Spirituality and Healing, I applied for this Organization Development doctorate program. This OD program

became my purpose, and pulled me through the transition into a new job, new relationships, an even stronger sense of who I am, and I relocated to a home in a lake country setting I always dreamed of.

I learned about myself throughout this journey. Putting myself through a life review during the discovery process of this research revealed a great deal. My decisions and actions of the past not only make sense to me now, but serve as a guide for the future. I heightened my curiosity not only about my own life but how others study and learn from themselves. Learning how others have used life review as a guide for themselves provides me courage to pursue my dreams, passion, and purpose in a very deep way. I now feel that pursuing my purpose is the only way.

This dissertation, and the entire OD doctorate program, has heightened and tuned my ability to facilitate change. The results of this study have energized my passion to work with individuals, and the organizations that support them, in their authentic and holistic retirement planning process. While the results are fascinating to me, I will mostly cherish the time I spent with sixteen individuals who were willing to open themselves up to a complete stranger and discuss their fears, dreams and passions. I appreciated and learned so much from each and every interview. People are remarkable creatures. My only hope is that the time I dedicated to this dissertation helps people understand themselves better, know that they matter, and provides a framework to not only move through the troubling transitions in life but to pursue any and all opportunities to live a meaningful and purpose filled life.

## References

- AARP (2012). Life reimagined. Retrieved June 22, 2013, from <http://lifereimagined.aarp.org/#>
- Anonymous (2007, October). The new meaning of retirement. *Black Enterprise*, 38(3), 19-19.
- Bridges, W. (2009). *Managing transitions: Making the most of change* (3rd Ed.). Philadelphia, PA: Perseus Books Group.
- Burgess, P. (2011). *Reboot! What to do when your career is over but your life isn't* (1st Ed.). Victoria, Canada: FriesenPress.
- Butler, R. (1963). The life review: An interpretation of reminiscence in the aged. *Psychiatry*, 26, 65-76.
- Chalofsky, N., & Cavallaro, L. (2013). A good living versus a good life: Meaning, purpose and HRD. *Advances in Developing Human Resources*, 15(4), 331-340.
- Cole, D. (2013, January 13). The good life; Why you need to find a mission; Having a purpose in life, new research shows, could be the key to a successful retirement. *Wall Street Journal (Online)*. Retrieved from <http://search.proquest.com.ezproxy.stthomas.edu/docview/1269002017?accountid=14756>
- Crumbaugh, J. C., & Maholick, L. T. (1964). An experimental study in existentialism: The psychometric approach to Frankl's concept of noogenic neurosis. *Journal of Clinical Psychology*, 20(2), 200-207.
- Erikson, E. H. (1963). *Childhood and society* (1st ed.). New York, NY: W. W. Norton & Company.
- Frankl, V. E (2006). *Man's search for meaning*. Boston, MA: Beacon Press.
- Geangu, E. (2008). Notes on self-awareness development in early infancy. *Cognition, Brain, Behavior*, XII (1), 103-113.

- Gold, S. F., Rotella, M., Andriani, L., Scharf, M., & Zaleski, J. (2002). *Publishers Weekly*, 249(32), 289.
- Jung, C. G. (1976). *Psychological types* (2nd ed., Rev.). Princeton, NJ: Princeton University Press.
- Kets de Vries, M. (2003). The retirement syndrome: The psychology of letting go. *European Management Journal*, 21(6), 707-716.
- Kim, J. (2011). Retirees may consider non-clinical "encore" career. *Physician Executive*, 37(1), 78-81.
- Lavelle, M. (2006, June 12). Work may add meaning to your later life. *U.S. News & World Report*, 140(22), 58-60. Retrieved from Business Source Premier.
- Leider, R. J. (2004). *The power of purpose. Creating meaning in your life and work* (1st ed.). San Francisco, CA: Berrett-Koehler Publishers, Inc.
- Marris, P. (2002). "Holding onto meaning through the life cycle." Pp. 13-28 in *Challenges of the third age: Meaning and purpose in later life*, edited by R.W. Weiss, S. A. Bass. New York, NY: Oxford University Press, Inc.
- McVittie, C., & Goodall, K. (2012). The ever-changing meanings of retirement. *American Psychologist*, 67(1), 75-77. doi:10.1037/a0026259
- Mourkogiannis, N. (2007). On purpose. *Business Strategy Review*, 18(1), 38-41.
- Muratore, A. M., & Earl, J. K. (2010). Predicting retirement preparation through the design of a new measure. *Australian Psychologist*, 45(2), 98-111.
- Papa, A., Lancaster, N. G., & Kahler, J. (2014). Commonalities in grief responding across bereavement and non-bereavement losses. *Journal of Affective Disorders*, 161, 136-143.

- Papa, A., & Maitoza, R. (2013). The role of loss in the experience of grief: the case of job loss. *Journal of Loss and Trauma, 18*, 152-169.
- Pepin, G., & Deutscher, B. (2011). The lived experience of Australian retirees: 'I'm retired, what do I do now?'. *The British Journal of Occupational Therapy, 74*(9), 419-426.
- Regents of the University of Minnesota (2013, June 25). Center for Spirituality and Healing. Retrieved July 10, 2013, from <http://www.csh.umn.edu/workshops-and-lectures/the-purpose-project/index.htm>
- Rhoades, D. R., & McFarland, K. F. (2000). Purpose in life and self-actualization in agency-supported caregivers. *Community Mental Health Journal, 36*(5), 513-521.
- Sani, F. (2008). *Self continuity: Individual and Collective Perspectives* (1st ed.). New York, NY: Psychology Press.
- Schlossberg, N. K. (2009). *Revitalizing Retirement: Reshaping your identity, relationships, and purpose* (1st ed.). Washington, DC: American Psychological Association.
- Schoonmaker, D. (2007). A purpose-filled retirement. *Grand Rapids Business Journal, 25*(28), B4.
- Seaberg, R. (2009). The "other part" of retirement planning. *On Wall Street, 19*(6), 82.
- Settersten, R. (2002). "Social sources of meaning in later life." Pp. 55-80 in *Challenges of the third age: Meaning and purpose in later life*, edited by R.S Weiss & S. A. Bass. New York, NY: Oxford University Press, Inc.
- Stake, R. E. (1995). *The art of case study research*. Thousand Oaks, CA: SAGE Publications.
- Staudinger, U. M. (2001). Life reflection: A social-cognitive analysis of life review. *General Psychology, 5*(2), 148-160.

- Sundstrom, E. D., Burnham, R., & Burnham, M. (2007). *My next phase. The personality-based guide to your best retirement* (First ed.). New York, NY: Springboard Press.
- van Solinge, H., & Henkens, K. (2008). Adjustment to and satisfaction with retirement: Two of a kind? *Psychology and Aging*, 23(2), 422-434.
- Warren, R. (2012). *The purpose driven life: What on earth am I here for?* Grand Rapids, MI: Zondervan.
- Weiss, R. S., & Bass, S. A. (Eds.), (2002). *Challenges of the third age: Meaning and purpose in later life* (1st ed.). New York, NY: Oxford University Press .
- Zhan, Y., Wang, M., Liu, S., & Shultz, K. S. (2009). Bridge employment and retirees' health: A longitudinal investigation. *Journal of Occupational Health Psychology*, 14(4), 374-389.

## Appendix A

### Interview Guide

Process will include the following:

- Thank the participants for being a part of the study
- Review the focus of the study: What they have learned about themselves and life since attending the Purpose Project Workshop.
- Review the consent form, ask for signatures and questions.
- Check recording device
- Conduct Interview
- Ask participant if there is anything additional they wish to add.
- Remind participant they can withdraw from the study at any time.
- Double check recording of interview was performed.

### Interview Questions

- Please share with me your experience of participating in the “Purpose Project” workshop.

Probe: What made you feel that way (related to a specific reflection)?

Probe: Was there anything specific that you remember about the day such as an exercise, certain people, or certain feelings?

- How would you describe your purpose in life? What gives your life meaning?

Probe: How have you discovered that?

- What have you learned about yourself during your retirement transition?

Probe: How have these learnings affected your decision?

- How important is it for you to know WHAT your purpose in life is, and how important is it for you to be LIVING a life of purpose?

Probe: In what ways do you live your purpose in life on a daily basis?  
Has it always been that way?



- Have any relationships changed since you retired? How?

Probe: How do you feel about that?

- Has your identity changed at all since you retired?

Probe: Do people still refer to you (describe you) the same way?

- As it relates to meaning and purpose in what ways would you say you are living in the past, present or future?
- Is there anything else you wish to share?

## Appendix B

### Recruitment Letter

Dear Purpose Project Participant,

You are receiving this email (letter) as a past participant of one of the Purpose Project workshops offered by the Center for Spirituality and Healing. We again thank you for participating and hope that your experience was rich, rewarding and helpful on your purpose-filled life's journey.

We have been contacted by a doctoral candidate at the University of St Thomas who is working on a research project to complete his degree in Organizational Development. His dissertation involves interviewing individuals who have taken one of our Purpose Project workshops within the last few years. Joe Zandlo's desire is to obtain a deeper understanding of the experience of people who are in or nearing retirement and have chosen to learn more about themselves by pursuing a purpose identifying activity.

We at the Center for Spirituality and Healing are excited to see the results of Mr. Zandlo's research and to learn more about the experiences you had as a result of participating in our workshop. While we frequently do our own follow-up with participants, this opportunity will provide us valuable information and insights from a third party.

To qualify for this study you must have completed a Purpose Project workshop within the last three years and be currently between the ages of 55 and 68. Your participation is completely voluntary and you will not be financially compensated. Your identity and privacy will remain strictly protected as you would not be named or identified in the study in any way. If you agree to participate, Mr. Zandlo will contact you to arrange a personal interview that is targeted to last no more than 60 minutes. His questions will be simple and will allow you to simply tell a story about your experience. You may withdraw from the study at any time, and any data collected would not be used. You may also stop the interview at any time, or refuse to answer any question.

If you agree to assist Mr. Zandlo in this research, or if you have any questions, we ask that you contact him directly. His study is guided by the University of St Thomas and he will provide any information you believe is necessary before you participate.

If interested please contact Joe Zandlo at his University of St Thomas email, zandXXXX@stthomas.edu, or by phone 952-XXX-XXXX.

Again we thank you for your past participation in our Purpose Project workshop and we hope to see you again very soon!

Sincerely

Cass McLaughlin  
Outreach Coordinator

## Appendix C

### Participation Agreement

#### UNIVERSITY OF MINNESOTA

*Twin Cities Campus*

*Center for Spirituality & Healing  
Archdiocese Health Center*

*Mayo Memorial Building  
400 Dulac Avenue Street S.E. MAR 87 303  
Minneapolis, MN 55455  
Office: 612-624-9454  
Fax: 612-624-2250  
www.csh.umn.edu*

August 29, 2013

University of St. Thomas  
Institutional Review Board  
2115 Summit Avenue  
St. Paul, MN 55105

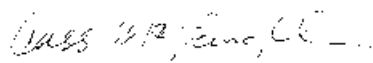
Dear IRB Committee Members,

The University of Minnesota's Center for Spirituality and Healing is happy to support Joe Zandlo, a doctoral candidate at the University of St. Thomas, in his doctoral research.

We agree to work with Mr. Zandlo to solicit volunteers to participate in his research who have completed either a Living on Purpose, or Working on Purpose workshop at our Center. We will send email and letters to our past participants outlining Mr. Zandlo's dissertation research, and request that individuals who are interested contact him directly with questions or to volunteer to participate.

We are happy to entertain any questions or concerns that arise through the Review Board process.

Sincerely,



Cass McLaughlin  
Outreach Coordinator