

# Finding New Purpose



Preparing for your retirement: Workbook Two

## Redefine yourself distinct from your work role

Work plays a key role in determining our sense of 'who we are' and our sense of esteem. It is a topic of conversation (think about how many times you have asked someone "what do you do?" or "how is your work going?"), it determines a large part of our day's structure (e.g., when we need to awaken from sleep, when we can plan errands and leisure time), it offers opportunity to socialize, and it contributes to our esteem.

When we retire from work, we can lose some of the defining roles that work plays and so it is important to replace these roles. The more strongly we identify with our work role, the more difficult this may be to accomplish. Even those of us who are well prepared for retirement can expect a period of transitional adjustment that can take a toll on our sense of identity, our worth, and our well-being.

For some of us, despite the many roles we have in life (e.g., spouse, partner, wife, husband, parent, grandparent, coach, mentor, hobbyist) no role is as important or influential as our work role.

**The focus of this workbook is finding a new purpose and expanded sense of identity as you prepare for your next role: retirement.**

### People you admire

You can learn a lot about yourself and what you aspire to in your future by taking note of people you know who are retired, and whose path in retirement is something you admire. You may not want to take the same path, but you may learn something about the process they followed to get where they are and the ways in which they made their transition possible.

**On the next page, write down the name of someone you know who is retired and whose retirement path you admire.**

- What is the person's name.
- What is it about this person's retirement that you admire (e.g. they spend 6 months of each year abroad; they volunteer on a regular basis; they have part-time employment as a consultant to their original employer)?
- For each of the components of their retirement that you admire find out the specific steps that this person took to achieve them.

Name of retired person:

Planning steps taken to achieve this.

Aspects of their retirement I admire.

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After having identified different paths during retirement, what you admire about certain people you know who are retired, and steps they took to get there, what have you learned that you can apply to your own situation?

## Planning your legacy

When you reach your late adult years, what do you want your legacy to be?

Imagine that you are celebrating your 80th birthday, surrounded by friends and family. Write down the traits, values, and achievements you respect and like about yourself and for which you want to be acknowledged. List at least 10 items. Allow your imagination to run free.

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Next, answer these questions.

- What do you want others to say about what you have accomplished in the 20 or more years after your retirement?
  
- What specific actions did you take in your retirement years that you want to serve as inspiration to anyone younger than you who is present at this celebration?
  
- What are some of the talents and skills you developed during your retirement years?
  
- What social connections did you make during your retirement years?
  
- In what ways did you make a difference in the lives of your friends? Your family members? Your community? The world?

## Brainstorm options for your future from your past

The broader and more expansive your identity, the more activities and pathways you'll have to choose from during retirement. For example, if you identify as "a retired accountant" you'll have many fewer choices in your future than if you identify as "a person who is always willing to learn and looking for new adventures."

One of the ways you can come up with options for future activities is to think about what you've enjoyed in the past.

Make a list of activities and accomplishments from your past that are part of your warmest and happiest memories. Need help remembering? Review high school yearbooks, old letters and correspondence, photo albums, appointment books and calendars, journals, etc. Talk with friends and family about the past.

As you pursue this life review, keep these questions in mind and write your thoughts down as they come to you.

- What interests or talents did you demonstrate in the past (think about things you accomplished, created, pursued)?
- When you were in your teen years, what did you enjoy doing in your spare time? What extracurricular activities did you participate in?
- What were some of your happiest moments of your life as a teenager and young adult? What were you doing?
- What are your most satisfying and proud achievements?
- More recently, what did you enjoy doing (e.g. the past work week, the past weekend).

Note: When you are doing this exercise, pay particular attention to your actions and behaviour. The point is not to just remember when you felt happy or were having a good time, but to recall the specific actions you were taking (i.e. your behaviour) at those times. This way you'll increase your chances that you will have specific actions to take during retirement that will serve to create even more of these good memories.

# Other ideas for finding your life purpose

You may have a good sense of what gives your life meaning and purpose, or you may want to generate even more ideas. The following short exercises may be helpful. You don't have to answer all the questions or take all the recommended actions. Choose the ones that are appropriate to your situation, or the ones that make the most sense and 'speak to you.'

## What have you always wanted to do?

Make a list of everything you've always wanted to accomplish. Don't limit yourself to what is achievable with your current resources (skills, talents, finances, time, etc). Let your imagination run free. For example: run a marathon, travel the world, become a writer, create an influential website.

**I've always wanted to:**

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**Review your list.**

Which of the items is at least *somewhat* possible for you to accomplish if you really put your efforts towards it?

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**Pick two items and create a plan to turn these ideas into reality.**

From your list of possibilities, choose two. Create a specific step-by-step plan to make this possible in whatever time period is appropriate for that item (e.g. you can begin training for a marathon immediately, with a goal of running a 1/4 marathon three months from now; a 1/2 marathon in a year, and a full marathon in two years).

1.

2.

**What might stop you?**

For your two possibilities, what might interfere with executing your plan? What can you do right now (in terms of planning or action) to ensure that nothing comes between you and these goals and/or what you will do when you encounter an obstacle.



## When were you in the 'flow'?

The term "flow" is sometimes used in psychological circles to refer to when we feel fully immersed in whatever we are doing...energized, focused, fully involved. The concept of "flow" was originally proposed by Hungarian psychologist, Mihály Csikszentmihályi.

According to Csikszentmihályi, flow is completely focused motivation. It is a single-minded immersion that represents the ultimate in harnessing emotions in the service of performing and learning. When you're in flow, you are positive, energized, and aligned with the task at hand. Colloquial terms for flow are 'in the zone' or 'in the groove.'

Think about times when you have experienced flow. During these times your mental and emotional state would have been characterized by the following:

- Feeling challenged but within reach of your capabilities.
- Highly focused. Concentrating deeply on the task at hand.
- A distorted sense of time. Usually losing all sense of how much time has actually passed performing the activity.
- An effortlessness to your actions. Whatever you are doing is intrinsically rewarding.

When have you experienced flow? What were you doing? What kinds of activities or situations do you become completely absorbed in and energized by?

In the past month, I experienced flow when I:

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In the past six months, I experienced flow when I:

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In the past year, I experienced flow when I:

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In my early adult years, I experienced flow when I:

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In my teen years, I experienced flow when I:

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Note: Instead of thinking back on past years, you can also think about when you've experienced flow in various domains like "work activity", "volunteering", or "hobbies." Do whatever it takes to identify activities that reward and energize you.



**Review your list of activities. Can you determine any actions that can help you recapture this sense of flow?**

Activities in which I experience flow:

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Does this list suggest anything useful in terms of helping you find purpose in your retirement years?

Are there any skills or talents that underlie these moments of flow that you can more actively pursue in your retirement years?

## Translate your purpose into actions

Your challenge now is to translate purpose into action. For example, if you've identified that you receive great satisfaction out of contributing to your community, you need to find the ways in which you can contribute during your retirement. Then, you need to identify specific behaviours and actions that you can take.

1. Start with some of the activities and events that you identified earlier in this workbook. For example, what were some moments of flow? What did you identify as something that gives meaning to your life? What did you identify from your youth that was motivating and energizing to you? What did you identify as a goal or something you've always wanted to do?

2. For each item you listed, identify specific actions that you can do in your retirement years.

When you put it all together it might look something like this:

*One of the most satisfying moments of my life was when I felt like I was making a difference in another person's life. I know that when I'm helping people learn new things I feel no greater reward. That's definitely a time of 'flow' for me and a passion that I have endless energy for.*

*I am going to look into volunteer teaching opportunities at my local community centre. Specifically, I'm going to get a copy of the current catalogue of workshops and investigate the steps to proposing a new workshop and becoming the teacher of that workshop. I will also talk to the program director to let them know what I want to do and find out if they have any helpful information for me.*

## Setting goals

The earlier you develop specific goals for your retirement, and translate these goals into actionable steps (i.e. behaviour) the better you'll be prepared to cope with the potential psychological repercussions of retirement. You don't need to fear that you are going to be locked into any of these goals--you can change or modify them as your circumstances, interests, opportunities, and skills change.

Setting goals is an empowering exercise and one that can give you a sense of direction and optimism.

What are your retirement goals in each of the following categories (you are best off planning for a balanced portfolio of goals):

**Health** (e.g., weight train three times weekly).

**Wealth** (e.g., continue to build the value of my assets).

**Personal** (e.g., learn to paint with acrylics).

**Social** (e.g., establish a monthly get-together with a group of friends to comment on a book we are reading).

**Giving to others** (e.g., teach in an area that I have some expertise in).

**After you have written down your goals, think about two action steps you can take in the next short while that will bring you closer to achieving these goals.**

## About goals

When setting goals, it's important to keep the following in mind:

- The goal should be important to you.
- The goal should be within the realm of possibility for you (based on talents, skills and interests). If you need more practice or learning to achieve the goal, include this as part of your plan.
- Define the goal very clearly.
- Break goals into small parts that can be achieved without too much effort or time.
- Be specific about your goal in behavioural terms. Always think about what you need to do, in terms of actions, to achieve the goal.
- Include plans to deal with any obstacles that might interfere with achieving your goal. These could be mental or emotional (e.g., "I tend to give up easily when I'm frustrated").
- Spread your goals across different areas of your life (e.g., health, social, community). Much like having a balanced portfolio of finances, you should have a balanced portfolio of goals.

## About Volunteering

One of the most satisfying ways to feel purposeful in retirement, and to build a strong sense of worth and value, is through volunteering.

In a special issue of the *American Psychologist* (January 2000) the notion of 'what makes you happy' was discussed. Researchers concluded:

- Happy people participate more in community organizations than do less happy people.
- Happy people tend to be less self-focused (and more other-focused) than less happy people.
- The stronger your connection to others, the lower your likelihood of experiencing depression.

Other research has shown that:

- Volunteering enhances life satisfaction.
- Volunteering is associated with better levels of functioning (as measured by health, mental and emotional well-being).

So get volunteering!

- Research causes that are important to you.
- Consider the skills that you have to offer.
- If you're willing to learn, seek out opportunities that require you to take some training.
- Prepare a resume that a volunteer organization can review.
- Contact museums, art galleries, libraries, hospitals, extended care homes, community centres, youth or adult organizations, sports teams, shelters for battered women or homeless persons, etc.
- Look for opportunities in your neighborhood and community. If you see a need, do something about it (e.g., form a clean-up crew for your local park or neighborhood).

## Derek and Janet find new purpose

Derek and Janet both identify strongly with their skill sets and their work roles. But as they put more thought into it, they recognize that they identify more with the skills and talents they have, and not just their job title or their associations with a particular employer. This realization was an important one. It reinforces how important it is for each of them to plan how they will continue to apply these skills during their retirement years: Derek through part-time renovation jobs and renovating their home; Janet through part-time consulting and short-term contracts with other companies.

Derek and Janet also have a mutual friend whose retirement path they both admire. His name is Alan and he used to work for the same employer that Janet does, until he retired about 5 years ago. For three years after retiring, he continued working part-time with this employer, slowly reducing his commitment from 1 day a week to 1 day per month. At the same time, he was spending increasing amounts of time landscaping his home. He started a neighborhood landscaping volunteer group to keep up some of the shared spaces in the community. And in winters when there was no landscaping or reason to spend time at home, Alan started travelling the world with a goal that he would explore a new country each time he travelled.

Derek and Janet look towards Alan as a model for their retirement:

- They see that it's possible to continue using their skills. In Janet's case, she is reassured that she can work on small contracts in her same field, just as Alan continued to do.
- Derek and Janet value how Alan set himself a three-year plan to slowly reduce his part-time workload from working 1 day a week, to 1 day per month, to eventually stopping altogether.
- They value how Alan busied himself with landscaping projects and at the same time kept himself challenged, physically active, and connected to his community.
- And they value how Alan is pursuing a lifelong goal to travel. This requires a lot of planning and research. They see it as a way to keep mentally and physically challenged.