

Sea Change Retirees: Bridging Expectations

Speaking Notes

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WHAT WE SET OUT TO DO was to encourage retirees – or to learn how to encourage retirees – living in Mandurah, Western Australia, to return to work, at least part-time. For two reasons:

- local businesses were struggling to find staff: this work started at the height of the skills shortage, which was particularly acute in WA and lack of suitable staff was a real problem;
- for the well being of retirees themselves – which we know can be enhanced by work in the way it provides social contact, mental stimulation, and income

It seemed self-evident to many that Mandurah possessed a pool of potential workers: as a sea change community an hour south of Perth it was attracting a disproportionate number of retirees:

ABS 2006: the proportion of the population aged 65 and older in Mandurah was 18.2% while in WA it was 12.0%

Further: the proportion of the population aged 65 and older in the workforce in the Peel region in 2001 was 2.1% compared to the WA average at that time of 7.7%.

I won't go through the excruciating process our team went through to find this pool of potential un-retirees. Suffice it to say it included: (i) feature articles in the local papers, (ii) brochures in libraries, senior citizens centres and elsewhere, (iii) material in every community organisation's newsletter – sporting clubs, residents associations, (iv) we spoke to Rotary clubs, Probus, (v) we visited retirement villages.... we spoke to recruitment agencies... the works. With what has to be said was very limited success.

We did meet individuals who had un-retired but in most cases they had been coaxed back into the workforce by an employer (or employee) who knew the retiree personally. Had these individuals not received the personal 'tap on the shoulder', they would not have sought the work, although they found being back at work stimulating and appreciated the opportunity.

THE ALMOST COMPLETE LACK OF INTEREST IN EVEN THINKING ABOUT UN-RETIRING ... this profound lack of interest in the possibility is what surprised us, and the City of Mandurah for whom we were doing this work. Got us thinking about the expectations of retirement...and how much they are shaped (or reinforced) by the environment one chooses. This is speculation – what we're interested in. Have seen hints:

- example of the gentleman who moved to a retirement community in Tucson and decided his new neighbours were actually fairly bored and quite capable of working – he became a single-handed 'tapper on the shoulder' and within a year he had some 200 of his fellow residents at work. A one-person recruitment agency;
- Nicole Maestas at RAND has done some work on un-retirement in the US – she was most interested in whether returning to work was triggered by financial or other problems in retirement ... whether un-retiring was planned or unplanned ... whether there was a phenomenon of burn-out and recovery – but the analysis didn't include environmental/peer factors that might be an influence;
- A project underway - Transitions In Later Life (TRAILL) investigating the psychosocial and cognitive outcomes of residential relocation and retirement – a collaboration between National Seniors, ANU (Timothy Windsor) and the Illawarra Retirement Trust. This project broadly aims to study changes in psychological wellbeing, social networks, and cognitive function that are associated with two major life transitions - residential relocation from community living into a retirement village, and retirement from the workforce – which promises to be very informative.

SIGNALS THE MANDURAH ENVIRONMENT SENDS ... or, perhaps better, the signals that are picked up by Mandurah retirees – that influence them to un-retire or not – appear to be:

happy holiday here: Retiring to Mandurah is to buy into the image of an extended holiday – which is on the Poster, won't repeat that here except to say:

- the fresh new retirees are active: golf...fishing...boating ... recreational... it *is* a holiday, for a while¹;
- but as they get less active, returning to Perth or a prior home location – similar in Victor Harbour ... This scenario applies especially to people who have moved to private accommodation (some very expensive) where they have that option to move again because their sea change residence has more or less kept its value. Retirement villages are another matter because equity can be significantly reduced when one tries to leave.

cocooning: A large proportion of Mandurah's retirees do live in retirement villages: there are a lot of retirement villages there and the number is growing. This environment sends its own signals to residents – at least we have noticed a quite particular mindset, one that's been confirmed in conversation with village managers and some residents themselves:

- These villages sell themselves in part on the idea that they *are* villages. One person we spoke with described her retirement village, glowingly, as just like the country town where she had spent most of her life. The idea of village-ness implies that you will find everything you need here. This accords well with the sense of security – that what I need is safely here – which motivates many to move to a retirement village in the first place [*whether that sense of enhanced security actually is true in practice is another matter*] There are pluses to retirement village living (research shows older men have more social contact; help one another through crisis periods ... although can be cliques, book club example)
- Nonetheless, a disconnect develops for residents between their internal retirement village community and the broader external community – a finding that is a source of concern for the Mayor and some councillors;
- also see a general passivity: waiting for someone else to organise things ... being on the receiving end rather than the creating end ... things put on making things too easy, lacking challenge.

We've come to think of this as a kind of 'cocoon' effect – that in this village I am safe, things will be brought in form me...I'll just hang here comfortably wrapped.

So what we have seen in Mandurah is a set of signals that send misleading – or, at least, limited and limiting – expectations about growing older and old. It's almost as though they have hung a sign on themselves saying 'I am past my prime'.

WHAT WOULD BE BETTER SIGNALS? better in the sense that those long years of retirement work to continue people's growth and development – that the years have purpose and meaning. We would suggest three:

(i) seeing the second half of life whole ...

there is texture to those 30+ years but tend to be active old (Third Age) and frail/decrepitude (Fourth Age) ... whereas need a finer grained picture. Analogy with 19th century child/adult as the full taxonomy ... then inserted infancy ... adolescence ... toddler ... It will be even harder to describe the texture – better to call it 'texture', if tried to find 'phases' it would distort the kind of growth to occurs in the second half of life – harder than with childhood/youth development because the chronological age – the number – means precious little; well, nothing, actually. In development through one's early 20s age is quite a good predictor of what the person's 'up to'.

¹ the happy holiday image may even be distorting the traditional commitment to volunteering: a number of community organisations are finding it difficult to attract people to volunteer in positions of leadership or responsibility. although this may be more generally true: Melville is also finding volunteers who want responsibility. What was more obvious in Mandurah is the tendency to volunteer 'seasonally' allowing them to travel ... And where once volunteers stayed committed to a single organisation for years, current volunteers are more prone to flit from one organisation to another and to volunteer.

We don't have that language yet for the second half of life: Gerontologists, is this a task for you? In general we need to develop a richer, more nuanced picture of the second half of life – not just a gradual downwardness. Evidence of mental vivacity in the centenarians ... and particularly, a better understanding that physical (and indeed mental) changes do not automatically impair functionality. Comes again to our interest in environments for ageing, including questioning the 'gold standard' of independence – that successful ageing means remaining independent

(ii) environments that promote diversity in social contact... inclusive communities... social landscapes that build informal, sustainable social supports, but again, a need to think about language: not talking about social isolation (focusing on a problem – inventing a 'disease' to be cured) but as an opportunity. Examples of environments that might do this:

- City of Melville, a suburb in Perth metropolitan area, has since 1993, been actively researching and responding to senior's issues – early involved with WHO Age-Friendly Cities – but are focused more now on Neighbourhood Plans. These plans are interesting; each presents a snapshot the neighbourhood: its history, the people who live there, and the assets they share. Residents consulted about the challenges and opportunities that exist. In quite different neighborhoods consistent theme: how do we communicate more effectively with each other, as neighbors... how do we further develop our parks for all age groups ..., etc: all wanting a real feeling of community, feeling at ease and a part of things;
- Marv Thomas' 2003 book *Personal Village: How to Have People in Your Life by Choice, Not Chance* <http://www.personalvillage.com/pvhome.html> ... this is about intentionally creating a 'friendship nest-egg' (to parallel a financial one). He poses some interesting questions to get people thinking about building a personal village:

Is it your experience that relationships forged in the heat of a crisis are inherently stronger, or have the ones established before the onset of a personal crisis been stronger and more resilient?

Do you think that being purposeful and strategic in your relationships undermines your sincerity? If so, can you think of ways to enhance your own Personal Village that are consistent with your values and integrity"

- role of technology... social networking not just for the teens and 20-somethings. Example of www.eons.com which bills itself as the on-line community for Boomers. Can join or start groups. Random sample: The deMedici Family – people interested in the Renaissance. Each group has a manager and a couple of moderators...

Talk to other care-givers

Calling All Athletes

Liberals and Progressives – 356 members; 2965

messages (not all politics – can be music anything: to have fun)

Our Back Porch (just to natter)

Seek Him First

Connecting to the Internet for content and social connectedness (e.g., <http://www.timegoesby.net/> with some well written and thoughtful elderblogs) and using email, mobile devices ... Doctors emailing and texting their patients. This is a new and necessary literacy. The kind of seniors computer classes that teach the old dears to click on the computer is like teaching a migrant to say 'hello' in English and leaving it there.

(iii) environments that invite challenge and support challenge: when people say they have left work because of ill-health, I often think their situation is more correctly described as being sick of current job/work environment/managers. And that what may be wanted is, after a spell, to work again but differently: part-time and in a changed role or field – something new, different, energising. Two examples:

- Encore Careers ... 'work that matters in the second half of life' www.encore.org The Encore Organisation has basically designed a campaign to engage millions of experienced individuals in becoming a force for social change by moving to an 'encore career' in the non-profit or public sector ... a career with a social purpose: addressing society's biggest challenges.

Website has a host of resources including help establishing one's own group. Not dissimilar in intent or outcomes to Baltimore Experience Corps.

- University based retirement communities (UBRCs) primarily in USA (60 at last count) but U Canberra and the Illawarra Retirement Trust have just signed an MOU; we've talked to a few universities to float the possibility. In the States these UBRCs are symptomatic of a move away from retirement communities in the country, near a golf course, but are in urban areas or on university campuses. They are in demand – one outside Boston has 225 residents and a waiting list of 100 – actually this one requires residents to enrol in 450 hours of continuing education and itself is classified as an educational institution. The attraction for all of these UBRCs is moving into an environment that is intellectually as well as physically active – the programs on offer are intergenerational (a big attraction). Note that these are inhabited not only by Boomers – or even primarily – but the generation before them.

Kendal an interesting example – has seven UBRCs, the first in 1991. Each different in that a lot of the ideas about how they should be organised genuinely come from the residents but all based on continuing learning, encouraging lifelong growth [and continuing care]² ...

<http://www.kendal.org/>

In general, can think of these as delivering Csikszentmihalyi's *Flow* [Csikszentmihalyi, M 1991, *Flow: The psychology of optimal experiences*, Harper Perennial, New York]: that time when one is so absorbed you don't notice time passing. Where challenge and capacity to meet it balanced in such a way that have to stretch just that bit – and get feedback.

Finally, two ideas about the implications for research, policy and practice – for turning what we've learned into what we do:

1. the conference took the theme: 'translating research into policy and practice'. We believe there is a third necessary translation: **TRANSLATE RESEARCH (and policy and practice) INTO PUBLIC UNDERSTANDING**. Our paper has specifically focused on expectations (in our case, of retirees about retirement, and the shaping of those expectations), but a consistent message in many papers and posters is what older (and younger) people know and think or, more often, assume and don't question: for example, (i) about [the inevitability of] cognitive decline, (ii) about the extent of elder abuse, (iii) about the value of providing medical and other remedies to old/older people, and so forth.

Important because it is the decisions and actions of individuals that, in many ways, determines the effectiveness of policy settings and even the efficacy of practice. Older people (and their families) are necessarily collaborators in the enterprise of our ageing well, as individuals and as a society. Their accurate understanding of the possibilities and constraints is critical, and their ability to adjust their thinking, too, as we progressively learn more about ageing, about practice and policy in shifting circumstances.

2. one aspect of public understanding we would emphasise is to **DEVELOP A MORE NUANCED PICTURE OF THE SECOND HALF OF THE LIFESPAN** – not that there is one path, of course there are many, and likely many more than we currently observe – but it is only when the potentialities and limiting factors are clear that the appropriate supports and services (and opportunities) will be constructed, and co-constructed with elders.

² The college or university benefits by having a group of dedicated retirees who support the institution in many ways, including financially and as mentors, advisors, or committee members. In addition, the institution has the benefit of a nearby "laboratory" for research and internships on everything from human development, nursing and social service to food service and business administration.