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Re-created Selves: Longitudinal Case Studies of Meaning-Making by Women in Retirement

Vivian Wilson Mott, Ph.D.

Abstract: The purpose of this second phase of longitudinal research was to continue exploration of women's retirement as a mid and late-life developmental transition, particularly looking at the ways in which the ongoing reflection and learning continued to impact the retirement experience of six women.

*The purpose of life is to matter, to count, to stand for something,
to have had it made some difference that you even lived at all.*

The issue of women's retirement is becoming increasingly important as large numbers of consistently employed women reach retirement age. Numerous factors have significantly impacted women's retirement, among them, altered workplace demographics, mandates regarding workplace discrimination and retirement age, improved health care and increased longevity, and changes in gender and career roles. However, much of the literature on retirement -- the preponderance of which has included only males -- has been prescriptive in nature, focusing on retirement planning, economic risks, and health issues. Some research has suggested that the economic vulnerability due to limited retirement resources and longer solitary life spans may not be the most challenging aspects of this life transition for women.

Earlier exploratory research in 1994 began the examination of women's retirement as a mid and late-life developmental transition, and the ways in which educational intervention might facilitate the transition. Of particular interest was the women's process of "meaning-making, or the examination and critical reflection of the thoughts and feelings embedded in the experience" of retirement (Mott, 1994, p. 22). That research suggested not only an active developmental aspect to women's meaning-making, but also their conscious deliberation regarding the integration of their retirement experiences into new self-concepts. Further, at the conclusion of the original study, the participants noted that their responses to retirement and even their self-concepts as women were continuing to change (Mott, 1998). Therefore, the purpose of this second phase of longitudinal research was to continue exploration of women's retirement as a mid and late-life developmental transition, particularly looking at the ways in which the women's ongoing reflection and learning continued to impact their retirement experience.

Review of the Literature

The conceptual framework on which the research was based was primarily drawn from four broad areas of literature. Literature on meaning-making (Carlsen, 1988; Frankl, 1963; and Kegan, 1982, for instance) and women's experiential learning (i.e., Belenky, Clinchy, Goldberger, and Tarule, 1986) served as the basis for understanding their reflective learning. Carlsen, for instance, refers to the cataloguing of the mind's information regarding any phenomenon, of "forming and reforming of intentions and significance, of what one has in mind

(p. 23). Much of Carlsen's work is based on that of Frankl and Kegan, both of whom saw the process of meaning-making as central to the human state. Belenky and her colleagues used the term "voice" to explain alternative ways of knowing, defining self, and making personal meaning out of our development and learning experiences. This framework was especially helpful in understanding the subjective, procedural, and increasingly constructivist ways of thinking in which the women engaged.

The third area of literature provided the foundation for understanding retirement in general. Broadly, this literature offers descriptions of various aging and retirement models and focuses on the predictors and risks associated with successful transition into retirement. For instance, of particular relevance with the women in this research were the activity and continuity theories of retirement. The activity theory explains the psychosocial tendency of retirees to find alternative sources of activity to replace those lost when paid employment ends (Friedmann & Havighurst, 1954; Miller, 1965). An extension of the activity theory is the continuity theory, generally credited to Atchley (1989), which suggests that retirees respond to the changes imposed by retirement largely through attempts to maintain continuity in more aspects of their lives than there is change. Finally, literature dealing with the variety of factors which influence one's transition to retirement -- among them, health, disposition and attitude, financial resources, occupation and work history, educational level, familial relationships, and social support networks -- emerged from multiple sources and was helpful in understanding the women's retirement experiences (Atchley, 1994; Clark, 1994; Kimmel, 1990).

In addition to these four bodies of literature which dealt specifically with the research at hand, educational gerontology resources (i.e., Erikson, Erikson, & Kivnick, 1986; Fisher & Wolf, 1998) were also considered relative to the various educational opportunities in which the women took part.

Research Methodology

In the first phase of research (conducted in 1994), data were collected from eight women between the ages of 58-74. The women had been retired for a period of 2-6 years from occupations in which they had consistently worked for more than 10 years; their occupational areas included education, nursing, business, and manufacturing and service industries. Introduction to the women -- all healthy and community dwelling -- was gained through colleagues, professional associations, and recommendations by other women. Regardless of the good health of the women involved, participant mortality -- or the loss of research participants due to any number of reasons -- is an issue of concern in any longitudinal research. In the original phase of this study, however, the women were so enthusiastic about their participation and contributions, and formed such close bonds with one another throughout and after the research, that there was little apprehension about losing any of them except to serious circumstances. Sadly, however, two of the original group of women are no longer a part of this second phase of research. One of the women died within a year of the first research phase; the second woman moved to another state to begin a new career (at the age of 70!) and help care for her grandchildren. The six women who now remain in the study -- one Asian, three White, and two African-American -- are 62-78 years of age and have been retired now for an average of 8 years. No new women have joined the research project at this point.

As in the first phase of research, data in this second phase were collected using in-depth conversational interviews and focus groups. Interviews of approximately one hour and focus groups that were frequently two hours or more in duration were again audio-taped and transcribed verbatim. To again ensure consistency in data gathering, an interview guide was used for the individual interviews and included such questions as: *How do you feel about yourself as a retired woman after these additional four years? What learning have you engaged in that may have helped facilitate your life in retirement? What impact have these [courses, workshops, counseling sessions] had on your meaning-making? How have your self-concept... life perspectives... activities changed? What do you continue to learn about yourself?* During the focus groups in this phase, there proved to be little need for guidance regarding conversation or research focus. The women were increasingly self-directed in discussing their further exploration into the role that retirement was playing in their lives. They relayed examples of educational activities they considered instrumental to their ongoing transition, probed one another for deeper exploration into topics that seemed promising from a developmental perspective, and encouraged one another with active listening and attention as their stories were woven. A third form of data came from journals that the women began keeping near the conclusion of the first phase of research. These journals provided a rich source of clarifying data, further intensifying their spoken words.

The data were analyzed using the constant comparative method. Since the women were queried in the original research about the consistency of themes and findings drawn from the data, in this phase of the project, the women actually anticipated being able to engage in this level of analysis again. Individually and in small groups, the women assisted with the categorization and coding of the data, often clarified the thematic structure of emerging findings, and posed alternative meanings and significance of the data. In keeping with their constant suggestions and contributions in the focus groups during data collection several of the women continue to serve as participant reviewers of this and other manuscripts evolving from the research.

Research Results and Discussion

Research findings initially indicated that the women were beginning to make meaning of their retirement experiences through the following process: (a) **exploration** of their lives in retirement, including the nature of retirement and the daily impact on their personal interactions, daily schedules, lifestyles, and health; (b) **accommodation** of the experience into the images they held of themselves, that is, sense-making of themselves as retired women; and, (c) **acceptance** of their retirement roles and the changes it held for them. At that time, most of the women had also begun keeping their journals, and all of the women were actively seeking out various educational opportunities and interpersonal relationships as vehicles for further exploration and understanding of their transition into retirement (Mott, 1994, 1998).

After the passage of four years, several of the women now spoke of better understanding their transitions into retirement, the developmental aspect of their experiences, and the reflection and growth prompted by the research, educational interventions, and social support groups. What had been conceptualized as a three-step process of meaning-making -- exploration, accommodation, and acceptance -- had now been reflected upon, reconsidered, and revised. The meaning-making

process was now reconceptualized as (a) reflection, (b) accommodation, (c) transcendence, and (d) integration.

Reflection. Two of the women suggested that what we initially termed "exploration" into the retirement experience would better be referred to as "reflection." As one of the women said, "I'm not just thinking about what retirement did to my day-to-day routine, even then I wasn't just thinking; I'm introspective, reflective about it." This conversation occurred during an early focus group with others agreeing with the subtle distinction and citing the benefit of the journals in facilitating the process of reflection.

Accommodation. The women continued to assert that one of the early means of making sense of the experience of retirement was to "work it into" the images they held of themselves as women. For one, her retirement from nursing meant that she could volunteer in her neighborhood school as a nurse assistant; for the business women, her newly developing sense of herself as retired was *accommodated* by her plans to write some training material for her local Chamber of Commerce. Thus, at this point in their retirement and reflection, the women were clearer that to make sense of themselves as newly retired women, it helped to accommodate that image with a continuation of some former role.

Transcendence. Another point of clarification had to do with what had been thought of as acceptance of the retirement role. Particularly evident in the women's journals was the theme of, not just acceptance of their retirement, but of transcendence, or the "rising above the limits of the experience [of retirement] ... with a new self-concept." In further explanation, one of the women spoke of the "ongoing re-creation" of her image, an "image which now doesn't define me in terms of what I did for a living, but as a woman in a new stage of life who used to do 'so and so' when I worked!" "You've transcended!" another chimed in, to which the first replied "Amen!"

Integration. Finally, several of the women suggested that the process of meaning-making didn't end -- as was previously thought -- with even this transcendence beyond the limits of retirement. Individually, in both their journals and interviews, as well as in the focus groups, the women spoke of their retirement experiences as "finally being *integrated* into the remainder of life." As one woman explained:

When I was a young woman, I had a child and being that child's mother defined me, who I was, what I should do, how I lived my life. Eventually, though, I was no longer just a girl's mother, but a woman who had a daughter, but did lots of other things, was lots of other... Well, there were other parts of me besides being a mother. It's like that with retirement, too. When I first retired, I was a retired teacher. I thought like a retired teacher. Hell, I probably even looked like a retired teacher! But eventually, I've become more than that. I'm a woman, a retired woman, but also a mother, former teacher, and a retired woman. Retirement is just another experience that I've integrated into the rest of who I am.

So, at the conclusion of this second phase of research, the meaning-making process now includes (a) reflection, (b) accommodation, (c) transcendence, and (d) integration into a fuller life perspective. Other findings were also evident and warrant brief mention. First, the women's often self-initiated efforts toward educational intervention and social service support facilitated their

successful transition into retirement in significant ways. For instance, the women participated in additional retirement seminars, journaling workshops, and credit and non-credit classes in such topics as aging and psychology, financial planning, and spirituality. They formed a "sisters reflection group" in which they continued the kinds of discussions begun in our focus groups. Second, although the women's sense of self-worth were not detrimentally influenced by their retirement, nonetheless, their work had been very important to them. Indeed, part of the meaning-making process included an accommodation of who they had been as employed women into their sense of self. Integration of the experience and the ability to not be defined by their work came later in the meaning-making process, after much reflection and growth. And third, at the beginning of their transition into retirement, the women seemed to exemplify the activity theory espoused by Friedmann and Havighurst (1954) and continuity theory, as explained by Atchley (1994). That is, part of their process of meaning-making was facilitated by engaging in alternative sources of activity that provided continuity in their routines and through which their identities could be maintained.

Implications for Theory, Practice, and Future Research

Not only does this research hold significance for adult education, but it is important for gerontology as well. However challenging longitudinal research in gerontology is, the increasing numbers of people living into their eighth, ninth, and even tenth decades offer gerontologists and educators a unique opportunity to investigate issues relative to aging, learning, and development. This research project is among a limited number which examines aging using a longitudinal model which can span several decades. The research adds valuable theoretical basis to literature on meaning-making, reflective processes, and women's learning. Through consideration of the educational interventions and support structures which proved instrumental in the women's learning and reflective processes, there are practical implications as well for educational programming and social service with the elderly.

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