

Workshop Background Paper:

Meaning and Purpose in Retirement

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"I've gone from Who's Who to who's he?" An Anonymous Retired Professor

"Our ultimate goal, after all, is not a good death but a good life to the very end." Atul Gawande

What is Meaning?

Meaning as used here refers to thinking and acting with purpose in accord with one's deepest values. Purpose refers to an end goal or goal set defining the reason for relevant actions or beliefs, which are grounded in our key values. Meaning encompasses both purpose and values, especially those that specify what is most important to us. Values partially answer the questions "In what are our purposes grounded?" and "Where did our meaning come from?"

Everyone has multiple purposes, but often people talk about a single purpose because a single purpose tends to be more powerful in shaping our lives. If all of one's purposes can be condensed into a single, primary purpose, it is easier to remember and it plays a more powerful role in guiding our daily lives. The same is true of the word 'meaning.' Using the singular form of the word meaning suggests a much more powerful role for the concept of meaning than referring to many meanings.

Some view meaning and purpose as externally derived from an external philosophy, religion, or ideology. However, the definitions used here presume meaning and purpose are internal, personal attributes, even if the ideas came from elsewhere. In other words, people interacting together and with institutions come up with shared values and beliefs that help each individual choose and pursue one or more purposes for living. These purposes make up that which we call 'the meaning of life' or 'meaning' for short.

In the past decade, considerable research, mostly by psychologists and sociologists, has helped unravel the importance of meaning and purpose for maturity and well-being (Smith 2017). This research also discovered a strong relationship between meaning and happiness. In general, greater meaning results from the following: acting with stronger purpose; greater motivation to achieve one's purpose; concern for the common good; caring for family, friends, and strangers; coherence of purposes; and attention to ultimate concerns, such as where did we come from and where are we going.

The following assumptions follow from the research done on personal and social meaning:

(1) Purposes and actions have greater meaning if they include community, caring for others and our

natural environment, without sacrificing essential care for ourselves.

(2) Meaning may be greater if one's focus is upon spiritual concerns, but not necessarily religion.

(3) Meaning is greater when one's purposes and actions have greater internal coherence or integration, which some call cognitive consistency.

(4) Meaning is greater when one's purposes and actions yield greater impact or influence upon the greater good.

(5) Meaning is greater when one is motivated to achieve one's purpose(s) and likes what s/he does each day.

In short, meaning increases with each of these five elements, which serve as five separate dimensions of meaning. So, to maximize meaning, you would maximize all five dimensions. Thus, the greater each of the meaning components for any given person, the greater the overall meaning for that person. The same applies to communities and societies.

Smith (2017) helped clarify questions of meaning. She observed "a growing new movement, one that is fundamentally reshaping our understanding of the good life." Her research shows that the search for greater meaning is far more fulfilling than the pursuit of personal happiness." Like so many who write on the topic of meaning in life, she strongly advocates doing things for others as the best route toward greater meaning and contentment with life. In her last chapter, she tackles the challenge of finding meaning in retirement. She notes that research finds that a sense of purpose declines with age and the transition to retirement. This emerging emptiness leads some in later life to seek radical changes like connecting with community volunteer projects, seeking out new activities, or even moving to a new location.

What is Purpose?

Purpose has already been defined as an end goal or goal set defining the reason for relevant actions or beliefs, which are grounded in our key values. Not all purposes are equally useful and powerful. Leider (2010) in the *Power of Purpose* argues that the foundations or ingredients of purpose are values, our gifts (our natural or learned capacities), and passions, which make us absorbed in what we do.

Purpose works best when it not only translates our values into action, but when the action takes advantage of our talents and skills, and when we feel passionate about the actions. For example, you might have been brought up to believe that your purpose was to convert infidels into Christians. Even if you greatly value such conversions, unless you have skills of persuasion and feel passionate about the work, you won't feel satisfied about your work.

One's purpose can be refined to make it more effective. The more succinct our meaning elements (purpose, goals and values) the easier it is to allow them to guide or shape our life decisions. To make a purpose more specific, start by writing down a list of your values and then rank them. From your top 2 to 5 values, formulate a purpose statement. Then re-write your purpose to make it short and easier to remember. Try applying your purpose for a few days, then see if you can recall additional really important values. Additional benefit will result if you can draw illustrations that represent your purpose. if you often write down your purpose, and if you share it with others.

What is Purpose Well-Being?

No consensus exists on defining well-being, but most agree that at minimum, well-being includes the presence of positive emotions and moods, the absence of negative emotions, satisfaction with life, fulfillment and positive functioning. The CDC (2017) defines well-being as "a positive outcome meaningful for people and for many sectors of society, because it tells us that people perceive that their lives are going well," including good living conditions.

The Gallup polling organization extended the well-being concept to include several types of well-being, one of which is *purpose well-being*, which they define as "liking what one does each day and being motivated to achieve one's goals" (Gallup (2014).

The Gallup project measured purpose well-being and found some interesting patterns. One is that entrepreneurs have much higher purpose well-being than other workers. Secondly, those with four or more years of college education have much higher purpose well-being than do those with only an elementary education. This indicates that entrepreneurs and more highly educated persons not only like what they are working on but they become absorbed in what they are doing. This partially explains why people with greater meaning and purpose are happier with their lives.

The Benefits of Meaning & Purpose

Some of the most surprising findings from health research has been in the health advantages of living when you have deep meaning or a strong purpose. Buettner (2009; 2017) studied communities where lots of people live past 100 and found that they attributed it to a strong sense of purpose. His study of 73,000 Japanese found that those with a clear purpose lived longer.

A study tracking adults for 14 years, found that purpose in life buffers against risks of dying (Hill & Turiano (2014). Another study in Japan (Koizumi, Ito, Kanekoo & Motohashi 2008) found that purpose was a protective factor against heart disease.

Of even greater intrigue, was a study by Boyle et. al. (2012) finding that people with a low sense of life purpose were 2.4 times more likely to get Alzheimer's disease or other mobility impairments. Finally, a study of pain management found that women with a stronger sense of meaning in life were able to withstand pain more easily (Smith, et. al. 2009).

A 2009 study of over 1,000 adults found that those with a high sense of meaning" spent more time and had deeper engagement with family, friends, and neighbors. A similar study by Andrew Zoli & Healy (2012) found that greater meaning was associated with greater resilience in response to negative emotions.

What may be of greatest interest are two studies of recent retirees. Among Shell Oil retirees, those that retired at age 55 were more likely to die early than those that retired at age 65 (Tsai, Wendt, Donnelly, de Jong & Ahmed 2005). And a study of 17,000 healthy Greeks found that the risk of death was much greater in the year right after retirement than in later years (Bamia, Trichopoulou & Trichopoulos 2008; Cox 2012). The important implication of these studies is that those anticipating retirement need to prepare for it by developing revised meaning and purpose in their lives to coincide with the adjustment of a sudden change in daily activities.

Social Construction of Meaning

Sociologists also have contributed greatly to our understanding of how social interaction produces shared ideas, beliefs and values. Peter Berger (Berger and Luckmann 1966) pioneered the understanding of knowledge as a social construction process. The understanding of meaning by both individuals and social entities arises from this piecing together of many fragments and conceptions.

What is especially relevant for understanding something so important as meaning or purpose is that individuals formulate their own conceptions of meaning through this process of shared discourse and comparison of purposes with others. Thus, any given individual might claim to have a life purpose that an outside observer might not perceive to be accurate or enacted in everyday life.

Social construction of meaning refers not just to the process of social consensus, but it applies to the development of individuals' reflection upon their own meaning. For example, sometimes individuals do not have a clear understanding of their own purposes for action, much less their underlying values. Through interacting with close others, one can socially construct a more accurate perception of one's own purpose or purposes.

Sociologists also pioneered the concept of life course to clarify how individuals' realities of meaning

adapt to the social role pathways that people follow over the course of their lifespan. Transitions in purpose and meaning represent major events because of their potential for shaping everyday life and well-being.

Meaning, Purpose & the Life Course

The role of meaning and purpose evolves over the life course. In childhood, the adults and older children in our lives, but our parents especially, stand by ready to give us advice and direction. Thus, their beliefs and values initially weigh more than our own. We look to others even for answers to questions like: What do I want to be when I grow up?

Upon reaching adulthood, we have much more freedom to choose our purposes and images of what we will become. But still we may ask: What do I want to do with my life? Transitions into marriage, having children, completing education targets, and accepting employment often push young adults toward such self-assessment. In midlife, we may have time to take stock and ask if our values and meaning in life are sufficient to give us the capacity to fulfill our self-defined purposes for careers and social life.

In later life, we can make the transition to retirement, we still have the challenge of deciding our direction and commitment to our goals. We need assess whether we will continue to pursue our purpose in full throttle or by slowing down the pace of our lives.

Finally, as we confront our mortality, we need to accept death as a part of life. As we approach signs of end of life, do we scale back on purpose and ambitions or try to inspire newer generations to continue the purposes we have worked hard to define and pursue over our lifespans. In other words, do we slow down or speed up our work on building a legacy?

What is Retirement?

Retirement consists of a transition from a status as an employee or worker to a non-worker status. The state of retirement has become increasingly complex to define because there are many more options available during retirement. Here is a list of some of the major retirement options available to some or all retirees:

1. Continue working in one's trade or profession on a paid or unpaid basis.
2. Paid work in a new field or career on a full or part-time basis, which is called an 'encore' career.
3. Unpaid work (volunteering) usually to contribute to the common good of the community.
4. Unpaid caregiving for family member(s).
5. Doing things with family and friends
6. Working as a political activist.
7. Unpaid creative work, e.g., painting or writing.

8. Education and other kinds of learning including reading, course-taking, studying, and research.
9. Entertaining self with games, friends, hobbies, etc.

Combinations of any of these retirement elements create additional retirement options. For example, travel generally consists the last two options: education and entertainment, but could include several of the others (i.e. 5 & 7) as well.

Phases of aging and retirement

A common stage analysis of both aging and retirement is to define three phases: the young-old (ages 65 – 74), the middle-old (ages 75-84) and the old-old (86 and older). Within the rubric of retirement, the first stage is when retirement typically begins, although more and more continue working during this initial phase.

The second stage (ages 75-85) is typically a period of settling into retirement or partial retirement and learning to accept yourself as an "old person." This process very often includes downsizing one's living situation and even moving to a community for the elderly. During this second phase, medical problems often begin to escalate.

The third phase (ages 86+) is sometimes called "[winding down](#)," (e.g., Connick 2017) and is typically accompanied by less energy, more medical problems and reduced work of all kinds. Often persons in this phase move into long-term care facilities such as assisted living and nursing care facilities. By this phase many of one's friends have died, leaving one planning for the end of life.

While some professionals and many business owners continue working not only through the first decade of retirement, but as long as they are able to continue to function in their job roles. If participation in unpaid work is included, many more retirees continue working into all three phases of retirement and aging. Professors and others, whose occupations are filled with research and writing, sometimes never intellectually retire.

An option that has gained considerable attention in the media and in academia is the transition to a new field or career just before or during retirement. This is reflected in the Encore movement pioneered by Freedman (2008) and refined by Moen (2016). While Moen describes transition to a new field or career as a new stage or phase in retirement, the most significant part of this trend to enter an 'encore' career is that the retiree can choose a new life-work that not only fits the older person's preferences, but the encore work may also have greater impact on the social good. This benefit derives principally from the encore performer's greater compatibility between personal capabilities and work requirements.

Major Transitions in Meaning & Purpose

Major meaningfulness transitions in the life course begin with the child's independence from the meaning and purpose of the parents. Other major transitions in early life include the start of schooling, marriage, child rearing, employment, and grandchildren.

As people near retirement age, a new set of meaning transitions become available as options: change in careers, reduction in work hours, change from paid to unpaid work, return to formal education and change to leisure activities as the dominant activity.

Not only do such life changes imply a change in principal purpose and goals, but behavioral changes many signify changing values. One may have to start over the process of articulating purpose and values as well as identifying those things that give the deepest meaning. But frequent transitions in meaning may make it easier and easier to reflect deeply and to rapidly adjust to new life orientations.

Transitions in meaning also become necessary when one is faced with major suffering due to illness or injury. This is especially true when illness becomes terminal and the loss of life looms nearby. Not only is the victim's meaning affected but the meanings and purposes of the family and close friends may shift as the social landscape adjusts to the loss of a member.

Meaningfulness versus Existential Indifference

Existential indifference is the opposite of a meaningful life. While it may seem like an empty way of living, research by Schnell (2010) has found that a surprisingly large number of people don't feel their lives have much meaning and don't care. In a random sample of German adults, he found that 35% of them were existentially indifferent. Basically, they did not see their lives as having much meaning but felt OK with that state. True they did not rate themselves as happy as those who felt their lives had a lot of meaning, but they did not seem particularly depressed or otherwise suffering. As older adults tend to have more time to reflect on their life goals and meanings, there may be fewer elderly alienated from purpose and meaning, but almost certainly some elderly live with considerable meaninglessness until the very end.

Negative Meaning and Negative Purpose

Meaning and purpose almost always imply positive emotions and constructive actions. What if one's purpose is to kill as many people as possible, does that qualify as meaningfulness? The popular revulsion to domestic terrorist shootings would suggest otherwise.

Destructive actions are in large part driven by a combination of societal conflict, such as discrimination or gross inequality, and negative emotions or affect. Hate, anger, fear probably are the biggest culprits, but other negative affect such as depression, deep sadness, spiritual emptiness, and

purposelessness also produce social destruction. Not only do these negative emotions disrupt communities and societies, but they also undermine meaning and purpose of the individuals and groups involved. In fact, these negative emotions produce forces like revenge that can easily become deadly.

The chief implication of these consequences of negative affect is that they crowd out meaning and purpose. Hate, anger and fear especially tend to destroy a sense of purpose and meaning.

Meaning, Purpose and Spirituality

As used here, the concept of spirituality means one's deepest values, ultimate concerns and a sense of awe and reverence toward the universe. The practice of spirituality typically includes meditation or prayer with contemplation of inner concerns and relationships with others. Sometimes these experiences are called self-transcendence and inner growth. Spirituality can occur with or without religious beliefs and rituals.

Gerontologist Atchley (2009) promotes the idea that "among elders, service for others can be a spiritual experience." His premise is based upon the reality that service stems from the impulse to care. The key is to be spiritually grounded while serving others and to avoid the trap of self-centeredness.

Contemplation, mindfulness meditation and yoga are practices for being fully in the here and now. Such intense awareness of the present moment aids the preparation to serve others. Basically, the practice of mindfulness, yoga and contemplation involve meditative practice where the focus of one's attention resides on one's breathing, a visible object, or anything except whatever randomly pops into your mind. More advanced forms of this type of meditation use slogans to focus your thinking and feeling upon desired traits like compassion, kindness, and so forth. Weber and Orsborn (2015) view aging as a spiritual path because the difficult later-life challenges of loss, meaning and mortality engage transcendence, inner contemplation, and other spiritual processes.

The teachings of some religions encourage thinking of purpose as a 'calling,' based upon a desired objective directed from divine sources. Even if a purpose does not originate from divine inspiration, it still may be called a 'calling' because family and friends may call for you to follow their desired purpose for you.

Meaning and Happiness

Meaningfulness is an essential ingredient of well-being and deep happiness. Thus, the recent research findings that happiness and meaning produce different behaviors appears counter-intuitive. Research by both Baumeister & Bushman (2016) and Smith (2017) has found that greater meaning in life but not happiness is correlated with helping others. The same is true of giving, deep thinking, and being wise or creative. Thus, these factors may ultimately lead to

greater happiness but only because they increase the meaningfulness of one's life. So, if you had to choose between happiness and meaning, the research shows that meaning pays off more. This is probably even more applicable for the older and oldest adults because if they had not learned to be happy at younger age levels, happiness may be highly elusive. The major exception is if elderly people make a special effort to concentrate upon building greater meaning and meaningfulness.

Some theories of aging suggest that happiness and subjective well-being tend to improve as workers move into retirement status. For many, this rise may be due to thinking of retirement as a liberation from tedious work. Support for this comes from two very large national surveys in the USA. In these studies, Drentea (2002) found that retirees, compared to workers, experienced less anxiety and distress and higher happiness or well-being, which supports the perspective that retirement tends to be liberating compared to work. In the study, retirees had a lower sense of control over their lives than did workers. Further research of this nature might uncover more about meaning in retirement.

Conclusion

Among English speakers, the words "meaning," "purpose" and "spirituality" lack precision and consensus. This essay has defined these concepts in relatively simple language and revealed how important purpose and meaning are to a successful life. Spirituality is important too, but the concept and the impact of spirituality on purpose and meaning are so complex that they are not addressed here in depth. The role of purpose and meaning in later life, including retirement, are very important in determining a "successful" or peaceful and stress-free end of life.

Some, but not all, studies of happiness by age have discovered that people in later life are happier than those in mid-life. This is counter-intuitive, given that those in later life have more health problems and more chronic pain. Maintaining humanitarian and other-directed values and actions are important to a successful and gratifying later life. Purpose, meaning and spiritual values may explain why the elderly may be happier than those in mid-life.

Additional discussion of the role of purpose can be found on the University of Minnesota's Center for Spirituality and Healing website (CSH 2017). Quizzes and discussion of vitality and 'true happiness' appear at Blue Zones (2017). A website devoted to avoiding depression in retirement can be found at retirementjoy.com (<http://www.retirementjoy.com/>).

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Appendix.

Case Examples of Meaning in Retirement

Below are three cases related to meaning and purpose in life, especially retirement life. There are questions at the end of each case that you could try to answer to exercise your skills in formulating and refining your own purpose and meaning.

The concept of 'moral biography' inspired this appendix with vignettes. Schervish (2017) has made a strong case for close affinity between the analysis of the role of purpose in one's life and moral biographies, which are biographical sketches with moral implications and guidance. This is one type of application in the new field in sociology identified as 'Altruism, Morality and Social Solidarity.'

Case A. – Marvin the Star Research Professor

Marvin grew up in a family of doctors and knew his purpose from an early age, but in his undergraduate years at Princeton, he found he liked to do research and discover, rather than to treat patients. After earning an

MD, a PhD in child psychology, and a residency in neurology, he was hired as a professor in the best program in the country for child neurology. For 40 years he continued as a leader in his field, publishing books, and lecturing widely. His personal life included a loving wife and children and many supportive friends.

When asked to name his primary purpose, he was tempted to say, "discovery and teaching," but he was more honest and thorough and said "gaining fame by discovering how to save lives and being a kind husband and father." Marvin retired at the age of 69 because he and his wife wanted to travel together, and he got a part-time consulting position with a drug company.

Three years later he began to feel bored and depressed. The awards and the invited lectures trickled to a halt. He missed interacting with lots of other doctors and students. Of course, he had meaning in his life, but no longer was he saving lives; no longer was he discovering new knowledge and winning awards.

A friend told Marvin that he should find out about the "Third Age" movement, which provides coaching for retirees to help them change their lives to greater meaning even without work and children. He investigated it, but he had already traveled a lot, and he did not the other options like gardening or politics.

But Marvin got the idea from his Third Age reading that volunteering to help others would give him meaning. He tried a half dozen different types of volunteer work: serving food in a shelter; packing food baskets in a food shelf; and tutoring disabled students.

Marvin's degenerate hip had begun to interfere with this volunteer work, but he heard about the Encore movement where people helped you find a totally new career, avocation or pastime. He did not really want to start over just when his hip was wearing out so quickly. Within a year, Marvin found it hard to work more than a hour at a time. Now in his late 80s, depression returned and he needs some advice.

What advice would you give Marvin? What changes in his life would you propose to bring meaning and fulfillment to the remainder of his life? Would you have advised him to take different retirement transitions?

Case B. – Sally the Hardworking Mother

As a brilliant and attractive young woman, Sally's purposes were to be financially independent as a physical therapist, fall in love, and raise several children, in that order. By the time she was 40, she had accomplished all three goals and all three children were in school.

Sally returned to work as a part time physical therapist, so as to have time for her main purpose, that of mothering. When the children went off to college, she no longer felt much meaning in her life. Neither her children nor her husband needed her as much. Her job in PT, did not challenge her mind.

As she was 55, it seemed too early to retire. She had strong political views, so she went to political events, City Council meetings, and volunteered for campaign work. All this activity energized her so she ran for State Senator. She lost but ran again and won.

Upon entering the State Senate, she was at retirement age but her feeling was that morally she could not retire when there were so many people that needed help, especially revitalizing communities that cared about their vulnerable members. A huge number of people living in her County suffered from racial, wealth, and opportunity inequality. To help them, she took on more and more leadership roles in the State government.

Sally at the age of 75 had found her primary purpose, to use her power and skills to help structurally disadvantaged people, while being a good family member. Her values for these purposes included altruism, compassion, charity, humanitarian and responsibility, caring, love and loyalty.

Just when she began to feel she could turn over her work to others with her same values, popular public opinion jumped far to the right, embracing racism, self-centered economics, and rejection of institutions such as human rights that depended upon humanitarian morality.

If you were in her shoes, what would you do in terms of your primary purpose of helping those living in hardship? Would you continue in a position of power or would you revise your goals, limiting your

purpose to something like supporting your family? If you remained an activist, would you work at the local or national level?

Case C. – Mary the Teacher

Mary grew up in a small town in Mississippi and went to an evangelical Baptist church every Sunday. While going to a Christian college, she read the book by Rick Warren, *Purpose Driven Life*, which convinced her that her core purpose should be “to make God smile.” Her purpose became one and the same as her calling. She became a preacher and believed her calling was to save souls, even though she also lived for being a good wife, mother and a Republican. Also, she often volunteered to help with kitchen duties at a homeless shelter.

How would you best express Mary’s purpose in life? You may wish to use a purpose-values diagram to help. First, make a horizontal list of Mary’s values in the middle of a piece of lined paper. Several lines above that line, make a similar horizontal list of Mary’s major purposes. Then draw vertical or angular lines connecting specific values with specific purposes. To represent a shift in purpose or values, draw a different set of vertical lines in a different color or a dashed line. See Figures 1 & 2.

Questions for the Meaning-in-Retirement Panelists:

1. What are your life purpose? Try to condense your purposes down to a single statement or phrase that is easy to remember, so that you can use it to remind yourself of your priorities. Keeping in mind that meaning refers to the values underlying your purpose or goals, can you summarize your meaning in retirement?
2. During the remainder of your life, do you expect a change or transition in your life purpose? If so, how?
3. When you entered retirement did you encounter any serious transition difficulties? How were these transition difficulties related to your purpose(s) before and after retirement? (You may define retirement any way you wish.)
4. During retirement have you experienced any major transitions in purpose? If so, describe.

Questions for any Retiree based upon Conclusions of this Paper:

- a. Did you find that your sense of purpose declined as you aged and transitioned to retirement?
- b. Some find the first year of full retirement to be a time of declining health and greater vulnerability? Did you?
- c. In retirement, do you still feel a need to embellish and promote the legacy you have been building?
- d. What have you learned about how spirituality can strengthen or weaken your commitment to meaningfulness?
- e. Have you found happiness to be an outcome of meaning and a strong purpose, or not?

Figure 1. Diagram showing links between Robert Kennedy’s values and purposes for full and brief purpose statements. Dashed lines represent secondary meanings of purpose elements.

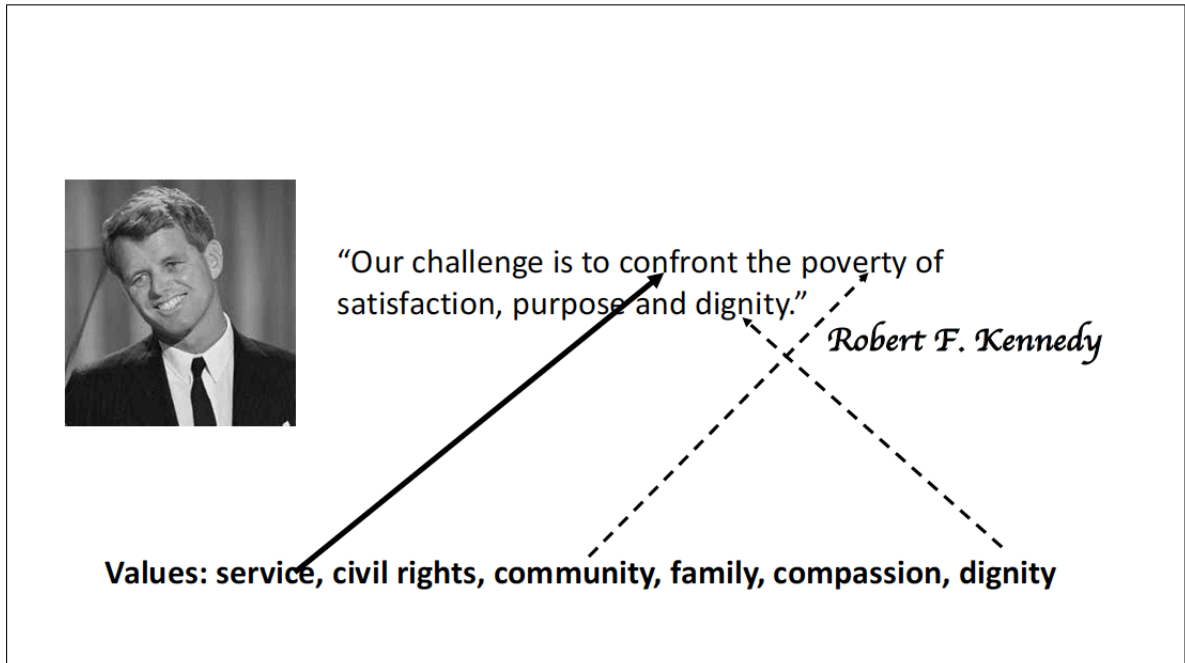


Figure 2. Diagram showing Pokémon’s values and purposes for full and brief purpose statements.
Note: diagram is flawed because it omits both fun and excitement as purpose & values.

