

An **Infopeople** Webinar

Wednesday  
December 6, 2011  
12 noon—1:00 p.m.

**WHEN THE CLOCK STRIKES 50: PLANNING FOR ACT III-RETIREMENT?**

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**AGENDA**

- ◉ Why this topic?
- ◉ What we're covering - and not covering
- ◉ Emotional steps
- ◉ Retirement as transition
- ◉ Elements of an ideal retirement
- ◉ Know thyself!
- ◉ Planning Act III

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**POLL: WHO'S IN OUR VIRTUAL LIVING ROOM?**

- ◉ Library Directors
- ◉ Supervisors
- ◉ Front-line staff
- ◉ Students
- ◉ Other

◉ Age?

POSITION     AGE

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PAULA AND GAIL



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**CHAT: WHAT MADE YOU CHOOSE THIS WEBINAR?**

- A few words, please answer using chat

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**CHAT**

- What comes to mind when you think about your retirement?



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### IT'S NOT YOUR MOTHER'S RETIREMENT

- Living longer
- Working longer
- Have more options than ever
- Reinvent retirement!



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### TRANSFORMING RETIREMENT

ACT I	ACT II	ACT III	ACT IV
Development	Productivity	Development Productivity Leisure	Leisure

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### 5 EMOTIONAL STAGES

- Imagination (6-15 years before)
  - Hesitation (up to 3 to 5 years before)
  - Anticipation (0-2 years prior)
  - Realization (retirement day and the year following)
  - Reorientation (2-15 years after retirement)
  - Reconciliation (16 years +)
- Chat: What stage are you in?

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### ABOUT RETIREMENT

1. Retirement is a career transition
2. Can be voluntary or involuntary
3. Stage of life
4. Includes biological aging
5. Requires economic support for an unknown time
6. Changes your level of engagement
7. Shaped by earlier life stages
8. Retirement well-being includes prosperity, health, and happiness

Nelson and Boles



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### TRANSITION

- What are some of the life transitions you've already been through?
- Use chat to tell us



• H/O #1 HELP WITH MANAGING

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### STAGES

1. Relinquish
2. Recess
3. Redefine
4. Re-engage

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**ELEMENTS OF AN IDEAL RETIREMENT**



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**UNDERSTANDING YOURSELF**

- Values
- [www.my.LifeValuesInventory.org](http://www.my.LifeValuesInventory.org)
- Strengths
- [www.VIACHARACTER.ORG](http://www.VIACHARACTER.ORG)
- Personality Style
- Fulfillment



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**WHAT DO YOU REALLY VALUE?**

- How do you sort out those things that are truly important-that make you tick - from those things that you learned to consider important only because you got approval and rewards for them?
- *Handout 3: Personal Turn-Ons and Turn-Offs*



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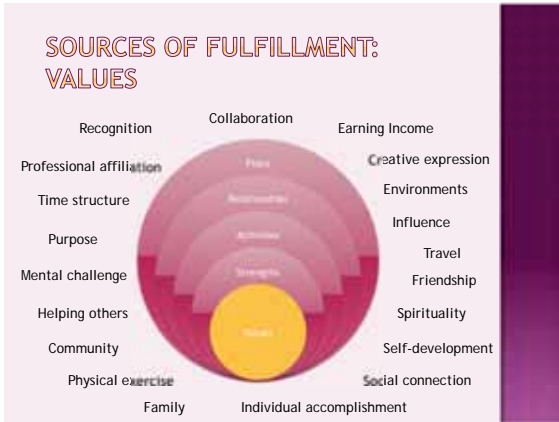
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### SOURCES OF FULFILLMENT

- What are the sources of fulfillment?
- Are they coming mostly from work?
- If so, what will you seek in the future?
- Activity style plays a role
  - Cooperative pursuits?
  - Helping others?
  - Independent accomplishment?
  - Self development?
  - Combination?

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### PERSONALITY STYLE

- Social: Contemplative -- Outgoing
- Stress: Responsive - Resilient
- Activity: Independent - Interdependent
- Information: Practical - Visionary
- Outlook: Cautious - Optimistic
- Decision: Analytic - Empathetic
- Planning: Structured - Flexible

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### ACTIVITIES

- What activities do you see yourself doing when you finish full time work?
- Use chat to tell us.



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### 3 CATEGORIES OF ACTIVITIES



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### RELATIONSHIPS

- No automatic relationship generator
- Trust and reciprocity
- Bonding and bridging



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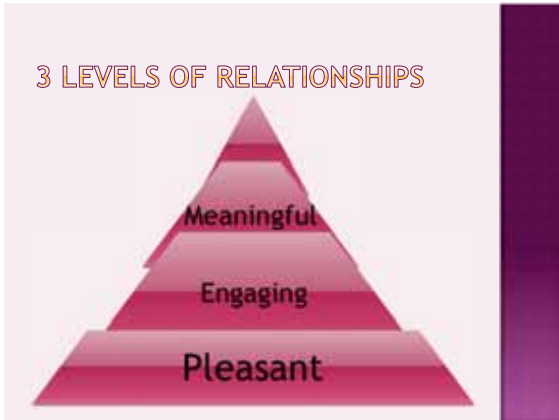
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PLACE

Where would you like to live after you retire?  
Use chat to tell us.

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WHERE TO LIVE?

S - sense of place  
A - aging in place  
L - livable community  
E - essential region

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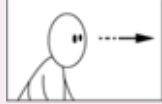
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### ANTICIPATING RETIREMENT

- ◉ What can you do now?
- ◉ If you haven't already...
  - Nurture close relationships
  - Find a passion outside of your job
  - Give of yourself
  - Build social networks
  - Build deeper relationships
  - Meaningful/engaging/pleasant
  - Marriage S/O - on steroids: space and time



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### ANTICIPATING RETIREMENT

- Take classes to investigate new interests
- Develop new skills for post-retirement work
  
- Think about:
  - Who will I be once I stop working?
  - What will my mental, emotional and physical health be?
  - What losses will be there in my life?

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### OPTIONS

- ◉ Work - sabbatical, reduced, alternative job, job share, telecommuting
- ◉ Temp, freelance, or consultant role
- ◉ Phased retirement/ bridge job
- ◉ Downshifting
- ◉ Encore career
- ◉ Retooling - another profession, starting a business, education
- ◉ My turn! (vol work, help kids, enjoying being free of commitments, practice being inner-directed)

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**CHAT:**

- Earlier we asked you What comes to mind when you think about your retirement? Let's check in again: What comes to mind now when you think about your retirement?

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**PLAN: HANDOUT - DRAFT PLAN**

- Health/exercise
- Meaningful activity/passion
- Relationship with mate
- Friendships: pleasant/engaging/meaningful
- Family
- Self development/spirituality
- Home
- Community
- Other
- Recess

Continue/Expand/Test Drive

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**ACTION PLAN**

1. What is the one step you will take in the next month to move you along the ACT III path?
  
2. In the next 6 months?

Use the chat to share an answer to the first question.

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### HANDOUTS

1. How to Manage Your Transition
2. Social Relationships and Activities: Pleasant, Engaging, Meaningful
3. Personal Turn-Ons and Turn-Offs
4. Drafting a Plan
5. Resources

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### QUESTIONS?

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### THANK YOU!

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- Gail L. Griffith  
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