The background is a deep blue gradient with abstract, wavy, light blue lines that resemble sound waves or data patterns. In the center-left, there is a 3D rendered figure of a person standing on a curved surface, possibly representing a globe or a platform. The figure is dark blue and appears to be looking towards the right.

Student Affairs Work/Life Balance
Retirement Readiness Workshop

March 5, 2015

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Beyond the Numbers:

Considering the Non-Financial Aspects of Retirement Planning



Goals for this Workshop

- to help Student Affairs staff (ages 50+) begin to think about and plan for the emotional and social aspects of retirement
- to help reduce “fear” of retirement
- to help create a SA Division culture where it is ok to talk about retirement as a positive aspect of one’s career journey



Content of Workshop

Specifically, we will:

- introduce the notion of retirement as transition (Schlossberg's model)
- Provide activities to help you begin or refine your vision of retirement
- Offer time throughout the workshop for questions and sharing
- Provide resources for you to continue your journey

Why Think About Retirement Now?

Student Affairs Division Data

- 40% are age 50 or over
- Of those 50 or over
 - 64% are non-exempt staff
- Avg. of 18 people per year are retiring from the Division
 - 72% are non-exempt

Linda's & Marcy's journeys

When I think about
retirement, I . . .



The Many Faces of “Retirement”

- Re-careering, encore career
- Part-time job
- Travel and Leisure
- Hobbies
- Volunteering
- Family & Friends



“A life reimagined”

<http://lifereimagined.aarp.org/?intcmp=IMAX-SB-WORK-life-reimagined/>



Questions to Ask Yourself

- Who am I? Who do I want to be (in retirement)?
- What gives meaning to my life? What are my core values?
- Do I still matter (am I valued) in my current job? How do I want to matter?
- Who will I socialize with? How might that change (or remain)?
- What will I do with my time?
- Do I have enough money to live on/do the things I want to do?
- Am I healthy and taking care of myself?

Schlossberg's Transition Model

- Roles, relationships, routines, assumptions
- Four S's
 - Self
 - Situation
 - Support
 - Strategies

Source: Schlossberg, N.K. (2004). ***Retire Smart, Retire Happy: Finding your true path in life.*** Washington, D.C.: American Psychological Association.

Schlossberg's Retirement Transition Model

Phase of Retirement	Task for Retiree	Ways to Ease the Transition
MOVING OUT	Let go of your work role	Name the process; grieve
MOVING THROUGH	Search for a new way to organize your life	Re-label; take time, suspend decision-making
MOVING IN	Creating your new path	Reinvest in new activities

Source: Schlossberg, N.K. (2004). ***Retire Smart, Retire Happy: Finding your true path in life.*** Washington, D.C.: American Psychological Association.

Emotional Stages of Retirement*



Stage 1: Imagination



Stage 2: Hesitation



Stage 3: Anticipation



Stage 4: Realization



Stage 5: Re-orientation



Stage 6: Reconciliation

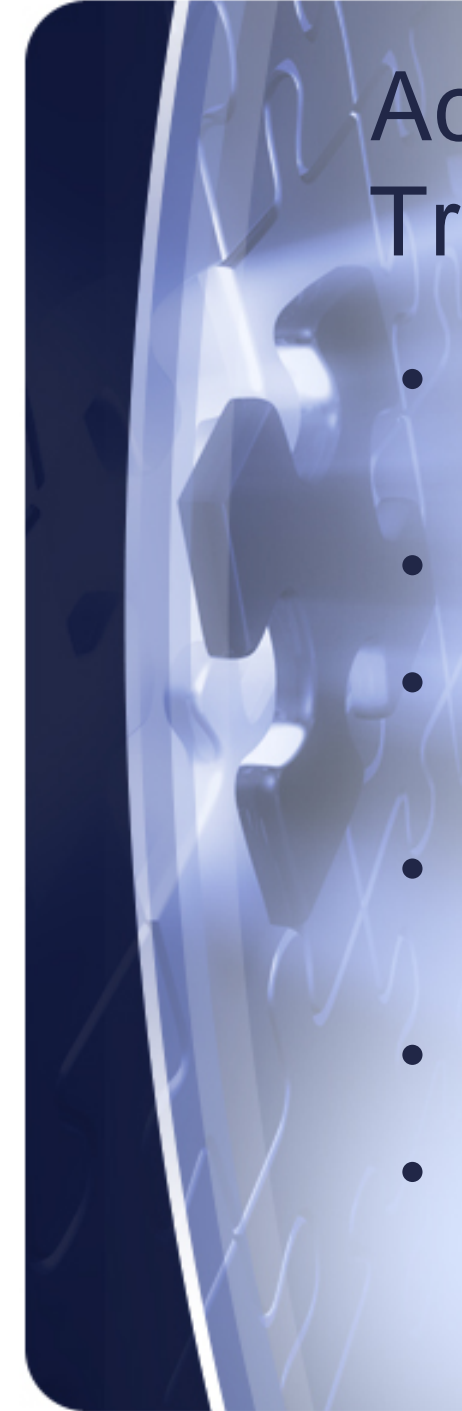
What are my core values?

- Values are the things that are most important to you in your life
- We don't often think/talk about our values
- Values are the “silent partners” *and* the driving force in decisions we make
- Being conscious of our core values can provide focus, direction, and greater satisfaction

www.lifevaluesinventory.org




Visioning Your Future




Actions to Take for a Successful Transition

- Pursue meaningful work and/or volunteer opportunities
- Plan time for leisure activities & hobbies □
- Become active in projects you couldn't pursue while working
- Develop new or reinvigorate relationships & social ties/networks
- Learn new skills
- Engage in physical/spiritual activities for optimal health and well-being □



Strategies for a Successful Transition

- **R**e-imagine yourself and your purpose in life
- **E**nvision a future that aligns with your core values
- **T**alk with family, colleagues, and friends about your new ideas, plans and goals
- **I**mplement lifestyle changes gradually
- **R**isk-taking is part of the process; don't be afraid to try something new or take the first step
- **E**valuate as you transition and make adjustments

A person is climbing a rope ladder against a blue background. The person is silhouetted and appears to be in motion, reaching up. The background is a gradient of light blue, and the ladder is made of ropes. The overall scene is motivational and suggests overcoming challenges.

You are never too
old to set another
goal or to dream a
new dream.

C.S. Lewis