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Creating a Lifetime of Possibilities

SUMMARY OF DISCUSSION: 2010 WINTER FORUM

Sarasota is in a unique position to frame the issue of an aging population and develop programs to transform individuals and communities. Over 200 people joined guests **Phyllis Moen**, McKnight Presidential Chair in Sociology at University of Minnesota, and **Michael Smyer**, Provost and Professor of Psychology at Bucknell University. The forum focused on transition, both for individuals facing retirement and for our society with the current aging workforce. Both speakers pointed out Sarasota as a possible laboratory to address these issues for greater benefit.



Overall, three main themes sum up the discussion at the forum:

- Current employers must use this aging demographic as an opportunity to restructure the workplace to be more flexible, with workers more in control of their career paths.
- Individuals need to plan for their retirement as a period of transition and as an opportunity to continue with sustainable meaningful engagement.
- Intergenerationally, people need to recognize and act on social links to maintain support and workforces need to focus on both assets and challenges that age raises.



Our Guest Speakers:

Phyllis Moen, PhD, teaches and conducts research on life-course transitions and trajectories related to work and family careers over the life course, aging and gender stratification, and family policy; her research has been featured in many mainstream media outlets. Her most recent book is *The Career Mystique: Cracks in the American Dream* (co-authored with Patricia Roehling), which won the Best Professional and Scholarly Publication in sociology in 2005 by the Association of American Publishers.

She also co-directs the Flexible Work and Well-Being Center, serves as a board member on Civic Ventures, is currently the chair of the Aging and Life Course section of the American Sociological Association, and has been elected as a fellow in the American Association for the



Advancement of Science, the Gerontological Society of America, and the National Council of Family Relations.

Michael Smyer, PhD, is involved in research and teaching focused on adult development and aging, with special attention to the impact of the contexts of aging (e.g. workplaces; nursing homes), and has written extensively on the policy aspects of aging and mental health. Of nine co-authored or edited books, he most recently edited the volume *Aging, Genetic Technology, and the Future* (with Cathy Read and Robert Green) (2008, Johns Hopkins University Press). He has extensive experience administrating in the academic world with his current position as Provost and previous positions as Co-director of the Sloan Center on Aging and Work/Workplace Flexibility, thirteen years as Dean of the Graduate School of Arts & Sciences and Associate Vice President for Research, and seventeen years as faculty member and administrator at Pennsylvania State University.

Thank you to our Sponsors:

Many thanks go to our Presenting Sponsor **Village on the Isle**, whose generous support made the 2010 Winter Forum possible. We also want to thank our Speaker Sponsor **Plymouth Harbor**, Civic Connector **Boyer & Jackson**, Innovators **Sunnyside Village** and **Take Care Home Health**, and Media Sponsor **Sarasota Magazine**.



Layout of the day's event:

It was a full day at the 2010 Winter Forum. Nick Gladding, SCOPE's Chairman of the Board and Tom Kelly of Village on the Isle gave the welcome and introduction, with Bill Buchman following to share his creative vision. Retirement expert Nancy Schlossberg then interviewed Phyllis Moen and Tim Dutton interviewed Michael Smyer concerning their views on planning for retirement, transition, and restructuring the workplace. A brief segment allowed audience questions, and after that, during the lunch break, attendees were given the opportunity to visit various information booths. A joint interview with both Dr. Moen and Dr. Smyer discussed the need to embrace and plan for change. Dramatic Solutions then gave an interactive, performance-based session on how to focus



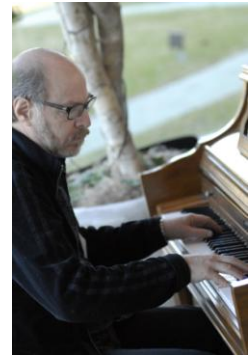
energy and minimize familial conflict upon retirement, inspiring the audience to brainstorm creative solutions. Doug Ross discussed Continuing the Conversation with the issues of creative arts and vitality, intergenerational dynamics, and universal design. Tim Dutton gave updates on the Institute for the Ages and closing remarks.

Art and Creativity Abound:



Bill Buchman’s artwork “Cakewalk” was the icon for this Winter Forum, making this the second year he has allowed SCOPE to use his original artwork in this way. Bill is an accomplished visual artist and musician; a graduate of the New England Conservatory, and a national teacher of adults - teaching courses on both the Creative Process and Drawing the Human Figure. Bill has made excellent DVDs on both these subjects and has a book coming out in 2010 on Expressive Figure Drawing to be published by Random

House/Crown publishers. He also gives classes at the Ringling College-Longboat Key Center for the Arts.



Bill kicked off the day with a stimulating array of creativity through painting, poetry and music. Bill focused on the interplay between creativity and aging. According to Bill, “making art is a great way to keep oneself mentally young and alive.” Making art, for him is “not to try to achieve immortality but to be able to visit eternity” because “time stops where art begins.”

Discussion with Phyllis Moen:

Phyllis Moen and Nancy Schlossberg then took the stage to discuss the aging population of our society—and Sarasota specifically—as well as retirement for individuals as either “the perfect storm” or the “perfect opportunity.” The 21st century has seen more people spending greater amounts of their lives in retirement than ever before and is seeing an increasingly aging workforce. As Dr. Moen explains, our society can use this new demographic as an opportunity to completely restructure career paths and to introduce greater work flexibility. Similarly, individuals can use their retirement as an opportunity to continue with meaningful engagement in their lives. With longer life spans and outdated career scripts, people need to readjust their visions and better



plan for their aged future. By brainstorming and implementing creative solutions now, Sarasota could potentially serve as a laboratory for the rest of the nation.

Dr. Moen would like to see a similar concept to Universal Design employed as an innovative solution for the aging workforce. Restructuring work to give employees more flexibility and control would be beneficial for all ages, but would also fit well with older populations in transition from full-time employment.



What structures are necessary and which can be changed to adjust to modern life trajectories? We can question and rewrite these “rules” about how work can be organized and mix it up. When asked, Dr. Moen stated she would most love to study best practices of businesses and organizations to achieve this.

Many people currently attempt to follow an outdated male script based on education for the first third of life, followed by one set career, ending with retirement. However, today women are retiring in greater numbers than before. Though men plan more for retirement as they more closely follow this script, women are better at customizing retirement because they more often need to customize their lives based on family expectations. Paid work for many is an identity that meaningfully structures everyday life. Retirement can thus lead to feelings of meaninglessness and disconnect.

As Dr. Moen puts it “people spend more time planning their wedding than their retirement.” Many are in denial about retirement, so don’t plan in advance because it induces anxiety. However, having a plan creates mastery and control. Additionally, by planning for many different scenarios, you will ultimately be better off. Retirement should be an exciting opportunity. At this point, many people do not want to lose meaning and social connections, but also do not want a new career. Instead, one solution is short-term, project-based involvement, like volunteering at schools or “work-a-teering” at the Senior Friendship Center. This can give status or small income and insurance, as well as the identifiable role and flexibility and control necessary to ensure sustainable meaningful engagement.

In her book *Linked Lives*, Dr. Moen discusses social networks and latent family ties that people have and how this relates to retirement. For example, currently more people are unmarried than ever—how does this affect support systems? With this disconnect in addition to living in 3-5 generations, we have to broaden the concept of family to ensure support systems. She points to different solutions for staying connected after retirement: social groups like ROMEO or Red Hat Society, volunteering, civic engagement, and life-long learning.

Discussion with Mick Smyer:

Dr. Mick Smyer then sat down with Tim Dutton to discuss the importance of planning for an aging workforce, similar to Lewis & Clark's "undaunted courage" and method of sending scouts back to report to Jefferson. In this way, Sarasota can be like those scouts in reporting to the nation in how to reorganize with the aging demographic of the future. But first, he discusses a bit about how he got into the field of gerontology. Dr. Smyer explains he was adopted by a 50 year old woman, so was primed for the issue of aging by growing up with older parents. He went through his research and work experiences at different major universities as Mr. Dutton called him "a bit of a rock star" in his field. Dr. Smyer went on to explain the Sloan Center initiatives in working with organizations on evidence-based practices on how to remake the workforce in regards to aging.



He discussed key workforce issues. For example, that diversity increases with age. Also, for employers, 40 years old is considered an older worker. However, at 50 many still say they are in their early career stage; age says little in this regard. Generation Y will have between 14 and 18 different jobs during their career. Company loyalty is not the same as it used to be with this transitional workforce (sense of entitlement), so employers need to think of what they can do to retain employees. BMW is one example that is ahead of the curve: they comprised one of their factory lines with workers of the age demographic of the future, noticed decreased productivity with current work structures, and corrected this with adjustments to meet the needs of these employees.



An important adjustment will be greater flexibility in the workplace, restructuring the way work is organized to fit a Universal Design (similar to what Phyllis discussed). He points out that in more flexible work areas; employers concretely have less absenteeism and more retention. Furthermore, Dr. Smyer discusses how intergenerational collaborative work will be

increasingly important. We must stop the generation bashing and stereotypes to see age as both an asset and a challenge. Collaborative work teams have the necessity to balance respect for age and life experience with the fresh enthusiasm of a rookie in his/her career. Overall, employers need to see age as a positive, to adjust for it instead of clinging to old traditions.

For those entering the later stages of their lives, Dr. Smyer discusses this period as a "second adolescence" and transitional phase similar to those in their early 20s. Both seek to reestablish

social networks, create new structures and meaning in their lives, and are in and out of employment. Similar to young adults, older adults need less structure and more flexibility. In this transition, Dr. Smyer lays out three questions one must ask oneself: 1) What gives me deep pleasure?, 2) What am I good at?, and 3) Who cares? (who will benefit or pay me?). They have a need for sustainable (in that youth with their sense of not enough time won't burn out), meaningful (in that retired adults with their increased amounts of time won't lose purpose) engagement. We must ask what issues get us excited.

Retired populations must also move from age entitlement to asking who needs their help. We need to maximize the needs of aging to provide for the next generation, focusing on sustainability.

Conversation with Phyllis and Mick:



After lunch, a joint interview was conducted with the two speakers. They discussed how communities are changing and that change can be messy: retirement is messy, life is messy, but change is unavoidable. Instead, people need a cognitive framework of how to approach retirement to realize that it will be difficult but to focus on what will be helpful for them. They brought up health and changing physical/mental capacities as an important issue to plan for by “planning for the unexpected.” It is not as important to plan for a linear life plan, for career or family or retirement, as it is to have a vision of where you want to go. Change is all about how you frame it, and uncertainty is part of the aging process. Those facing problems in retirement transitions must think back to how they have handled problems in the past and how that can apply to their current situations. Sometimes, however, they need to realize that they may need someone else to help.

As far as last words, Dr. Moen's is “nevertheless.” She explains this is her favorite word because it represents how no one size fits all. She also feels that Sarasota is on the cusp of great things. For Dr. Smyer, he takes this time to point out that not all communities are represented in the room at the forum. Different class, race, and backgrounds have shorter life spans which must be kept in mind. Some challenges are similar for everyone but some challenges can be quite different for different communities.



Dramatic Solutions:

A theatrical presentation led by Roz Cramer, Monia Joblin and Linda MacCluggage engaged participants in a dramatic interactive session. The actors dramatized an issue that is experienced by many people; life transitions that impacts parents and their older adult children. They examined not only the dynamic of what it means to an individual as they transition to retirement, but also the impact on the family.

They then asked the audience to react to the issue presented and asked them how they can address the issue, meet the challenge, and create change.



Continuing the Conversation:



Doug Ross updated the group on the progress that the ‘continuing the conversation’ group has made since the 2009 Winter Forum. A group of local citizens wanted to convene the community around the topic of aging. As a result, nearly 65 engaged citizens have been meeting to explore topics with the general purpose to explore what the individual can do and what

the community can do in regards to topics such as labeling and stereotyping, how to best take advantage of the wisdom of sages, the prospects for an Encore workforce in times of high unemployment, etc. Out of these discussions six groups formed around six key topics;



- **Arts and Vitality**
- **Healthcare**
- **Intergenerational Community Development.**
- **Personal Psychology: Identity, Purpose, Connections**
- **Universal Design**
- **Workforce**

You can read more about each of the groups work on SCOPE’s website at www.scopexcel.org.

There are two reasons why Sarasota County is an ideal location for this work. First, its population is on the vanguard of this demographic shift: a third of the Sarasota County population is over 65 today, mirroring the age distribution of the rest of the developed world in 2050. Secondly, our community – residents, local foundations, governments – has an unmatched focus on this issue. Both represent significant assets and value to potential users of the Institute for the Ages.

The Institute’s activities and functions will be **Raising Awareness** (identifying and convening thought leaders, champions, and innovators across all sectors), **Opportunity Management** (identifying opportunities, assembling the right teams to work on each, and facilitating the innovation process), and **Administration** (general day-to-day operations).



For more information about the **Winter Forum**, more **photos** from the day’s event, and more information on the **Institute for the Ages**, please visit **SCOPE’s** website at www.scopexcel.org.