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AUTHOR Cusack, Sandra A.; And Others
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ABSTRACT

This paper challenges the dominant view of leadership, the organizational-effectiveness approach, and proposes a different concept of leadership in the context of retirement. A premise is that the organizational-effectiveness approach is inadequate to the task of retirement organizations and may inhibit senior participation. Following an introduction to the concept of leadership, problems with voluntary senior leadership programs are identified. The problems originate from a conceptualization of leadership that omits the following contextual variables: authority that is vested in a single person and organizational goals that are stressed over individual needs. The organizational effectiveness model is argued to be inadequate because it denies older people the opportunities to experience a sense of power as members of a group and to contribute talents that give them individual recognition. A shared culture of leadership based on shared power and the satisfaction of individual needs is advocated. One table is included. (26 references) (LMI)

RECONCEPTUALIZING LEADERSHIP IN RETIREMENT

Problems with the organizational effectiveness approach in working with seniors

Sandra A. Cusack
Michael Manley-Casimir
Wendy J.A. Thompson
Simon Fraser University.

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Please address all correspondence to:
Sandra A. Cusack, Ph.D. Candidate, Faculty of Education
Simon Fraser University, Burnaby V5A 1S6, British Columbia, Canada.

Authors' note: The concept of leadership we propose is embedded in the leadership-training manual, Flying High: A Guide to Shared Leadership in Retirement, the product of a project funded by Health & Welfare Canada and sponsored by Simon Fraser University. For more information or to obtain a copy of the manual, you may write to the authors, Wendy Thompson and/or Sandra Cusack, c/o S.I.P. Leadership Project, Faculty of Education, Simon Fraser University, Burnaby V5A 1S6, British Columbia, Canada.

ABSTRACT

Serious questions are being raised about whether North American society can support senior citizens for as long as one-third of their lifespan. One solution is to provide programs to help seniors remain active and contributing to community life. A growing tradition of research focusses on seniors centres and the various factors influencing participation and the emergence of senior leadership. We believe the dominant view of leadership that pervades organizational life, reflected in the style of leadership and interactions between staff and seniors, has an important influence on senior participation.

The purpose of this paper is to explore problems with the dominant view of leadership, the *organizational effectiveness approach*, and to propose a more adequate conception in the context of retirement. To this end, we first (1) introduce the concept of leadership; then (2) name existing problems based on professional experience and empirical evidence in the context of seniors' centres in western Canada; (3) set the definition within the context of leadership theory and suggest ways in which it is generally inadequate, but most particularly so in relation to seniors; (4) focus on what is characteristic of retirement and retired persons that renders this definition inadequate; and finally, (5) propose a concept of leadership that is more adequate to the task of retirement organizations, which we suggest is to create a culture of leadership.

RECONCEPTUALIZING LEADERSHIP IN RETIREMENT

Serious questions are being raised about whether North American society can support growing numbers of senior citizens for as long as one-third of their lifespan. To meet the challenge of an aging population, there has been increasing interest in programs and services that assist older people to remain active, engaged, and contributing to community life. A number of research studies have focussed on the context of seniors centres (e.g., Cusack, 1991; Cusack & Thompson, 1992; Krout, 1988; and Ralston, 1991). In this tradition, Ralston explores determinants of seniors centre attendance and participation, and reports serendipitous findings that variability among seniors centres, rather than participant characteristics, may have a stronger influence on seniors centre participation (pp. 269; 270). She concludes that we need a broader framework within which to understand the role of seniors centres in the lives of older people.

We concur with Ralston. Our work in the context of seniors centres in western Canada suggests there are many factors that affect participation and involvement in programs and activities; such as the size, physical environment, organizational structure, history, programs, services, and characteristics of those in positions of influence. We believe the leadership style of those in formal leadership roles (i.e., directors, program coordinators, etc.) to be particularly influential. We suggest that the dominant approach to organizational leadership prevalent in North American society is inadequate to the task of retirement organizations and may be a factor inhibiting senior participation.

The purpose of this paper is to explore problems with the dominant view of leadership and to propose a more adequate conception in the context of retirement. To this end, we first introduce the concept of leadership, then name existing problems based on professional experience and empirical evidence in the context of seniors centres in western Canada. We then set the definition within the context of leadership theory and suggest ways in which it is generally inadequate, but most particularly so in working with seniors. We focus on what is characteristic of retirement and retired persons that renders this definition bankrupt; and finally, we propose a concept of leadership that is more adequate to the task of retirement organizations, which we suggest is to create a culture of leadership. We begin with a brief introduction to the concept of leadership.

The Concept of Leadership

> Don't be fooled! There are many paths, but ultimately all of them describe ways to "do" something that really can't be described at all. *What can't be said, can't be said, and it can't be whistled either.* If it could, mankind would have achieved universal enlightenment long ago, and the game would have been called for lack of interest. . . . Proceed with caution. Keep your feet on the ground. Think deeply. (unknown source, quoted by Dolmage, CSSE, 1991)

Leadership is one of those provocative concepts, not unlike education and happiness, that is central to our lives, yet elusive and confounding. Nevertheless, in the real world, we need effective leadership (however we define it and whatever our criteria) and we, as educational leaders, tend to move quickly to define what it is that leaders "do" in a given context in order to develop training programs that will help them "do it" more effectively. In so doing, we often operate from conceptions of leadership that are inadequate to the task; conceptions that fail to give full consideration for

contextual variables; and, in particular, fail to consider the characteristics of those who are being "led"—their needs, goals, expectations, and aspirations as well as their experience, qualifications, and lifeskills.

The conception of leadership that professionals working with seniors typically operate from is a variation of the dominant view:

> Leadership involves establishing a direction, aligning people in support of the direction, and motivating and inspiring people to continue moving in the chosen direction. (Kotter (1990, p. 6)

We refer to this particular definition as *the organizational effectiveness model* (as does Coombs, 1991) because it equates the exercise of leadership with whatever is necessary to maximize the achievement of organizational goals. The role of the leader that transcends the particulars of a designated managerial role (i.e., whether that person is called administrator, supervisor, president, program coordinator, or director) is the authority to and responsibility for envisioning a particular group's goal, defining its tasks, and motivating and inspiring "followers" to achieve these goals. There are a number of general problems with this definition, as well as particular problems when applying it to retirement organizations, such as seniors centres.

Problems Experienced

Seniors centres in North America rely upon a supply of senior volunteers willing to commit time and energy to the delivery and maintenance of programs and services to their peers. A number of problems have been identified by professional leaders and seniors themselves in the greater Vancouver area through surveys and focussed

group discussions conducted as part of the needs assessment phase of our leadership development project at Simon Fraser University.

We believe many of these problems can be attributed to the dominant view of leadership (i.e., a version of the organizational effectiveness model) that is held by both professionals working with seniors and seniors themselves. Actual problems are:

- A general shortage of retired people willing to commit themselves to volunteer responsibilities and to assume leadership roles in the seniors centres to which they belong.
- A few "willing horses" getting stuck with all the work.
- Many seniors in leadership roles are too controlling and don't know how to share power.
- Many seniors don't see themselves as leaders.
- Many seniors lack confidence in their skills and abilities.
- Many seniors lack the necessary skills and training.

These problems, we suggest, have their origins in an inadequate conceptualization of leadership that omits important contextual variables. Two particular problems we shall explore are (1) the authority vested in a single person and potential for misuse of power; and (2) the emphasis on organizational goals with little consideration for either (a) the needs, goals, and values of the individual or (b) their life experience, qualifications, and skills. In order to understand what is problematic with the model from a theoretical standpoint, we shall first place it in the context of leadership theory.

Theoretical Origins of the Organizational Effectiveness Approach

The subject of leadership invariably conjures up images of great and inspiring leaders (e.g., Ghandi, Churchill, Martin Luther King, etc.) and studies of "leadership" have traditionally been studies of "leaders," their qualities, skills, styles, and behaviours (e.g., Fiedler, House, Weber). Summaries and reviews of leadership theory reported over the past 70 years have, however, failed to come up with much that is definitive about either leaders or leadership (Stogdill, 1974; Hunt & Larson, 1977; McCall & Lombardo, 1978). There are many definitions of leadership, all of them focussed on the role of the leader and each one useful in different situations and contexts: the skills and styles of the leader that are most effective depend on the specific situation and what is demanded.

To understand leadership in organizations, we look to organizational theory. The designated leader has influence (or power) by virtue of the authority of office, and the way in which leadership differs depends upon a myriad of contextual variables (Yukl, 1988), all of which are omitted from the organizational effectiveness model. Leadership is considered to be a group phenomenon that involves influence directed toward achieving a desired goal or task—and success or effective leadership depends not just upon the skill of the leader, but also the attributes and skills of "followers," as well as organizational variables, most particularly *the nature of the task.*

Bennis (1959) provides a simple typology useful in considering leadership in different types of organizations and identifying some of the more important contextual variables. In particular, Bennis' typology (see table 1 below) is useful in considering how the role and the style of the designated leader/manager may differ depending upon the purpose of the organization and its corresponding effectiveness criteria.

Table 1. A classification of organizations according to type

TYPE	PURPOSE	EXAMPLE	EFFECTIVENESS CRITERIA
habit	replication	factory	no. of products
problem-solving	creating new ideas	research consulting	no. of ideas
indoctrinating	changing habits behaviour intellect	hospital prison university	no. of clients leaving
service	distribution of services	military government	extent of services performed

(Bennis, 1959, p. 297)

Bennis' typology, published over 30 years ago, is interesting for a number of reasons: e.g., he classified universities (and he was a university administrator) as "indoctrinating types" of institutions that function to *change intellect* . . . governments and the military are considered *service-performing* organizations. In addition to suggesting how concepts of leadership may have changed (or perhaps *ought* to have changed), the important points to consider, for the purpose of this paper, are the different styles of leadership that may be most effective in relation to organizational goals, the skills that both leaders and followers require within a particular organization, and the centrality of organizational goals to the criteria of effectiveness.

Apart from the centrality of the particular goals of the organizations (to which we shall return), what is missing in the organizational effectiveness model is a code of ethics for respecting the rights and freedoms of individuals. Because organizational goals take precedence and the responsibility for setting and achieving the goals is vested in the leader,

whatever methods of coercion and deception the leader uses to motivate and inspire "followers" (be it blackmail, brainwashing, or sexual harrassment) may be acceptable. The concentration of power in the leader and consequent authoritarian style of leadership is most often problematic.

The Problem of Authority

The leader who operates from a position of authority and control, even if coercing people for what he or she sincerely believes to be in their own interests, may have an insidiously harmful effect on individual autonomy. As Peters (1972) claims,

> When it is said that a man who brainwashes others, or who settles their lives for them without consulting them shows lack of 'respect for persons' the implication is that he does not treat others seriously as agents or as determiners of their own destiny, and that he disregards their feelings and view of the world. He either refuses to let them be in a situation where their intentions, decisions, appraisals and choices can operate effectively, or he purposely interferes with or nullifies their capacity for self-direction. He ensures that for them the question, What ought I to do? either scarcely arises or serves as a cork on the tide of events whose drift derives from elsewhere. He denies them the dignity which is the due of a self-determining agent, who is capable of valuation and choice, and who has a point of view about his own future and interests. (p. 210)

Regardless of whether or not the leader considers him or herself to be working in the best interests of those he or she is leading, failure to respect their rights and freedoms often diminishes them as persons and may create further dependency.

In retirement groups, an authoritarian style of leadership is particularly problematic for a number of reasons. Because many retired people have lost a certain status associated with the workplace, they may be more vulnerable to loss of confidence and self-esteem if they are not treated

with a measure of respect as autonomous persons. Furthermore, many retired people have greater practical experience, wisdom, and knowledge than the paid professionals in positions of authority.

Klein (1970), working in the context of seniors centres in the United States, provides this observation:

> [O]lder people feel a lack of respect when they are told what to do, they feel a lack of adequacy when they are not asked, feel put down when things are done for them rather than with the. . . . [P]eople are no longer willing to participate in programs where they do not have rights are not accepted as equal with people who like to think of themselves as the directors, administrators, policymakers, and leaders. (p. 1).

Seniors all need to have a measure of influence and they need to be involved in decision-making processes in the groups and organizations to which they belong.

The second problem concerns the ability of the professional to define group goals that address the needs and desires of individual members. The goals of the organization, according to the organizational effectiveness framework, take precedence. Not only does the leader have the responsibility for achieving those goals, the professional is charged with responsibility for identifying the needs and the best interests of members. The needs and goals identified by professionals tend to be consistent with organizational mandates, but are not of necessity in the self-defined best interests of individuals. In the case of seniors organizations, they very often are not. The service-providing type of organizational model sees the role of the professional leader as providing service to the client. Many people working with seniors interpret this as making decisions *for* and taking care of older people—goals that are counterproductive to what is *really* needed, as we will suggest.

Professionally-Defined Goals vs. Individual Needs

The dominant view assumes the leader will determine goals that are worthwhile and that others will "buy into them" in order to meet their personal needs. In business and industry everyone's task is to get the job done, and money may well be the motivator. The organizational effectiveness model works in many business contexts simply because money provides sufficient motivation. Such is seldom the case in retirement. The question professionals most frequently ask is, how can we get seniors more committed and involved and willing to share the workload? This suggests a lack of understanding for the needs and values of the majority of retired people which is essential to their commitment and involvement.

As professionals, we must consider the nature of retirement and the needs and characteristics of older people if leadership is to serve them well. Within the context of seniors centres, organizational mandates are typically broad and unclear (i.e., to serve seniors, to provide recreation). While organizational goals must take priority, if the mandate is unclear the professional in charge may interpret it in whatever way he or she prefers. The leader may serve personal needs for power and control while addressing organizational goals to the satisfaction of superiors, yet fail to serve the needs and aspirations of the membership.

Krout (1989) outlines the wide variety of organizational goals reflected in the policy statements of seniors centres across North America. Some of the broad goals he names are to serve the recreation needs of older adults; to provide social opportunities; to provide leisure activities; to serve the health and wellbeing of seniors through recreation and sport; to help seniors feel worthwhile; to develop self-esteem. Do such mandates reflect

the needs, hopes, and expectations of the majority of retired people? They certainly must, to some extent, serve the needs of the 15% of the retired population who choose to become members. What of those more than 80% of the retired population who choose not to get involved? To what extent do seniors' centre serve the real needs, aspirations, and goals common to retired people? What is the purpose or task of retirement that ought to be reflected in policy statements/philosophies of seniors' organizations?

Retirement

What is characteristic of retirement and of retired people? Retirement is variously defined as an event, as a particular stage of an individual lifespan, and as a social phenomenon or construction (MacDonald & Wanner, 1991). Retirement marks the end of a professional career or working life for most men; and for many women, it means the end of a demanding family role (i.e., that of wife and/or mother). For some it is experienced as a long-awaited release from tiring and often unfulfilling work, an opportunity to relax, travel, play some golf, read, rediscover a forgotten or undeveloped talent. As a rite of passage, it is unique because it is incomplete (Jarvis, 1989). Unlike other rituals in life (e.g., marriage, graduation, etc.) it marks a transition "out of" with no sense of what is beyond, what to expect, or how to prepare for it. Regardless of whether retirement is experienced as a welcome or a traumatic event, it involves the loss of a productive role:

> More than 90% of the employed population of this country work in formal organizations. Status, position, a sense of competence and accomplishment are all achieved in our culture through belonging to these institutions. (Bennis, 1990, p. 135)

While there is an assumption that professional people in general experience retirement positively as a time to pursue their own interests, there are many stories to the contrary. A professor of gerontology at a National Conference told his story:

> I was forced to retire at 65. One day I was somebody, the next I was nothing. It was terrible. I lasted for about six months and then I packed up and moved to another state where I could get a job teaching at another university. (Robert Gandee, personal communication, Pittsburgh, March 2, 1991).

One man of 93 reflects on the dream he had at the age of 65 the day he retired (Moody, 1991). In his dream, he sees himself dressed for work carrying a briefcase and walking down the mainstreet of town. A shot rings out and he drops dead to the ground. This serves as a powerful metaphor for what many older people experience: their lives end in some sense with the event of retirement—yet they may very well go on living for another thirty years.

Retirement is a social construction. In maintaining a mandatory retirement age, society makes the statement that the resources and skills of older people are no longer needed or valued. Retirement is an "incomplete ritual" that symbolizes the end of a productive working life, but with no designated role beyond, leaving many without a sense of meaning or purpose. While for many people (particularly women) grandparenthood represents a positive and meaningful role, this is less and less an option, given increased geographic mobility, and increasing numbers of people remaining single and/or choosing not to have children. The fact is that many retired people do have a sense of being unwanted and unneeded by society and, without viable options, they may cast about for a comfortable

way to spend their money and their time in the remaining twenty or thirty years (Erikson et al., 1986, p. 24).

In her study of the social environment of three seniors' community centres, Martin (1990) suggests that many professionals in managerial roles hold deep-seated negative attitudes toward older people as dependent and less able to make decisions or contribute to community life, attitudes that act as self-fulfilling prophecies. A widely-held presupposition that people have less to contribute as they age becomes the framework within which they operate.

Does society really value the wisdom of older people? Do we value their contributions or do we just want to keep old people busy and off the streets, as we would any non-productive group in society? Is retirement an opportunity for older people to make an important contribution to the community or is it another market for exploitation by business and professionals? Attitudes are often disturbing, even among so-called educated and enlightened people. The following comment is illustrative:

> So you're a gerontologist. Boy, are you ever in a growth industry. What are we going to do with all those geronts running around out there. They'll all want to go to school.

Such negative attitudes reflect the social construction of retirement as a time of disengagement from a meaningful and productive role in society and of retired people as having little contribution to make. What, then, *are* the needs and values of seniors that ought to be reflected in the conception of leadership that makes the definition in question inadequate to the task, as we understand it, of retirement?

Retired People

Older people are distinquished by their diversity of lifestyles, of health, income, but most important by the knowledge and skills developed over a lifetime of personal, practical and professional experience in the workplace, in the family, and in the community. They are unique and individual in ways that 5-year-olds and 20-year-olds are not. As a result of retirement and the loss of a design[illegible] role in society, many suffer from the feeling that they are not recogni[illegible]d valued as persons. This is how one retired teacher, who writes a re[illegible]r column in a Vancouver Newspaper, put it:

> Another point I [would] like to mention is the waste of our experience and knowledge. Many of us have 40 or more years practice in whatever they did. There is a wealth of accumulated know-how which nobody seems to use or want. By giving us some kind of possibility to use our experiences in a beneficial way, the so common feelings of uselessness and boredom could, at least partly, be eliminated. (Angres, 1989 p. 8)

Everyone needs to feel good and to be recognized as a person of worth. Regardless of whether retirement is experienced positively or negatively, it is a time for every individual to establish a particular role that provides a sense of meaning and purpose.

McClusky (1974), a leading figure in education for older adults, views the contributive and influence needs as central to later life. The *contributive need,* reflecting a need to feel useful and to contribute to the community, is the one that McClusky claims deserves greater recognition. This is the need, he suggests, that we ought to exploit in making better use of the resources of retired people. The *influence need* also has particular relevance to organizational leadership. Because of diminishing income,

resilience and self-confidence, power in the social realm is problematic. Older people occupy fewer social positions of real power and, therefore, they have a greater need to become agents of social change.

> Older people have a vital need for [opportunities] that will enable them to exert influence in protecting and improving their own situation, and in contributing to the well-being of the larger society . . . the result of such programs would be the development of new influence roles and a social climate more favourable for the development of self-respect. Such a program would also shift the emphasis . . . from 'doing for' older people to helping them 'do for themselves'. (McClusky, 1974, p. 336)

The organizational effectiveness model, in giving power and control to the leader, denies older people the opportunity to experience a sense of power and influence as members of a group. And with the leader taking responsibility for setting the goals, they are often denied the opportunity to participate in decision-making and defining goals that give expression to personal skills and talents, whatever they may be.

It is our view that retirement is and ought to be a time of continued growth (as Dewey suggests) and the development of full human potential. Abraham Maslow's theory of motivation speaks to the needs of the present cohort of generally healthy and active retired people. While Maslow's hierarchy is quite familiar, it is perhaps not so well-known that he reserved his concept of self-actualization for maturity and later life. In the preface to his second edition, Maslow writes:

> I have removed one source of confusion by confining the concept [of self-actualization] very definitely to older people. By the criteria I used, self-actualization does not occur in young people.
>
> Maslow (1987, p. xxvi)

Before they are motivated by the need to "self-actualize," people must first achieve identity, autonomy, and a personal value system: they must

experience a love relationship, have endured tragedy, success and failure, and attain sufficient knowledge to open the possibility of wisdom. It is through life experience that the individual becomes a mature, fully-functioning human being. The full potential of retirement as the culmination of a life is, in our experience, seldom appreciated by professionals working with seniors.

Retired people who have been in managerial roles in their working lives will be comfortable with giving orders and taking charge, but quite uncomfortable taking orders from a professional in charge who may be younger than his or her grandaughter. Because few of the present cohort of retired women have had managerial experience, they may be quite happy to let someone else do all the work. And if they aren't happy because the leader abuses power or isn't giving them what they need, they may just go elsewhere. After all, they are no longer paid to stay there and the freedom to choose is one of the benefits of retirement.

While everyone likes to be part of a team, to get things done, and to accomplish worthwhile goals, nobody likes to be told what to do and seniors don't have to anymore. It is no wonder, given the lack of opportunity to contribute their talents and to be recognized as persons, they may choose to "lead their own lives" and create their own sense of purpose in a variety of self-fulfilling ways. In many cases, the community is denied the full benefits of their unique skills, talents, and perspectives.

The Task of Retirement Organizations: Creating a Culture of Leadership

As we see it, the task of retirement organizations is to provide opportunities for older people to continue to develop their potential as persons and to contribute to society in self-chosen ways that give them a

sense of self-worth to the end of life. The organizational effectiveness model is clearly inadequate to the task. We have suggested the investment of power in one person denies all members a measure of personal influence and the focus on organizational goals that are often broad and unclear allows the professional to set goals in accordance with professionally defined needs of older people that seldom serve the actual needs, goals, and aspirations of individuals in the group.

Leadership in seniors organizations needs to be reconceptualized in a way that gives priority to and truly *serves* the needs of retired people as they themselves define them. Robert Greenleaf (1977) based his conceptualization of servant leadership on a lifetime of personal experience in various leadership roles. He claims there are, quite simply, two kinds of leaders: the "leader-first" and the "servant-first" leader. The leader-first type is the authoritarian leader whose focus is getting the task done, whereas the servant leader is

> sharply different from one who is leader first, perhaps because of the need [for] power or to acquire material possessions. The difference manifests itself in the care taken to make sure that other people's highest priority needs are being served. The best test and difficult to administer is: Do those served grow as persons? Do they while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? (Greenleaf, 1977, p.10).

In one sense, all retired people are leaders simply by virtue of being older and preceding us through history. The negative attitudes toward older people prevalent in society are attitudes that we will inherit and we, as professionals working with seniors, need to work with them in order to create opportunities for enrichment and engagement in retirement that will be their legacy.

The role of the professional leader is to promote a culture of leadership, to create the environment and opportunity for each individual member to share a measure of power and influence and to satisfy individual needs for continued growth and expression of personal skills, talents, and knowledge. For many seniors, part of that development will involve assuming formal leadership roles themselves, roles that will be much different from the authoritarian model to which they have been accustomed. The true leader's task, whether that leader is a professional leader/manager or a senior leader is, as Bennis (1990) claims,

> to create not only a climate of ethical bity but a climate that encourages people to learn and grow, prizes their contributions, and cherishes their independence and autonomy. (p. 146)

We need a greater understanding of how leadership functions in retirement organizations. There is little formal research to aid in the development of theory and none that addresses the question of how to motivate seniors to commit themselves to leadership roles. Our understanding of senior leadership has evolved over the past decade in consultations with seniors, in the development and evaluation of commmunity programs for seniors, through a review of the general body of knowledge on leadership, and in the research and development of a leadership-training program for the retired. Conclusions about leadership in retirement outlined in this paper represent working hypotheses that we are continuing to research.

We need a broader framework, as Ralston (1991) suggests, within which to explore participation in seniors centres. Such a framework ought to incorporate not just the characteristics of participants but a variety of

contextual variables such as the organizational philsophy/mandate, structure and physical environment, and the goals, characteristics, and leadership styles of professionals. Within such a framework, there are many questions that we continue to explore.

What influences seniors to participate in activities and programs, and to commit themselves to leadership roles in the seniors centres to which they belong? What are the needs and expectation of seniors that motivate them to become more involved and share the workload? Do seniors want to be challenged and to develop their potential, as Maslow suggests? Are they motivated by the need to create a productive role, to gain status and a measure of influence? We know that leadership training develops a willingness to get more involved (Cusack & Thompson, 1992, in press), but what other contextual variables might influence participation and commitment? What is the relationship of professionals and seniors? How is power shared within the organization? What legitimate influence do seniors have? Does the philosophy of the centre support the development of senior talent and potential? What are the underlying assumptions within the culture of the organization about the abilities of seniors, about effective leadership, and the nature of retirement that may be strong forces on participation and emergent senior leadership?

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