

# Beyond Retirement: A Review of Literature on Career Transitions for Older Workers

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*Current workforce trends show increasing numbers of older workers that will continue to work beyond retirement. To remain competitive, organizations will have to accommodate to emerging needs and provide alternatives to retirement. Scarce literature exists about career transitions beyond retirement. Recent scholarship is reviewed through an analysis of literature, in order to explore positive outcomes of career transition stages for older workers. Implications for organizations and Human Resource Development (HRD) professionals are proposed.*

Keywords: Career Transition, Older Workers, Retirement

Current workforce global trends inform us of the rapidly ageing society. The number of older workers is growing faster than any other age group (Huber & Skidmore, 2003). In the US workplace, longer life expectancy (Pollock, 2007), the rise of retirement ages (Munell, Sass, & Aubry, 2006), along with economic, social and psychological reasons, is increasing the number of older workers (Henretta, 2000). The Bureau of Labor Statistics estimated that between 2002 and 2012, the number of workers 55 years and older is expected to grow by nearly 50% (Toosi, 2002). According to (Friedberg, 2007) changes in public policy, private pensions, and health care systems suggest that individuals will work longer. Therefore, a high percentage of Baby Boomers plan to stay in the workplace beyond the traditional retirement age (GAO, 2005; Ibarra, 2007).

In addition, Van Horn (2006a) suggested that the US workforce is facing an acceleration of high business and job turnover, a breakdown in the internal career ladders for workers, and greater worker mobility. As a direct result responsibility for career advancement is shifting to individuals. However, “new realities of work-filled retirement must be addressed” (Van Horn, 2006b, p. 478). Furthermore, the demographic shifts in the U.S. workforce are already increasing pressure on the nation’s political and corporate leaders to come up with creative with solutions in policies and workplace practices. Policymakers should explore solutions that facilitate a work-filled retirement for employees who choose it, meet the needs of employers in need of qualified workers, and address the need of all workers for retirement security or beyond (Van Horn, 2006b).

Over the last decades the workforce has experienced downsizing, globalization, outsourcing, technological change, mergers, and acquisitions (Gysbers, Heppner, & Johnston, 1998). As a result changes in jobs have become inevitable (Sullivan, et al., 2003) and anxiety over job is common (Babcock, 2004; Eby & Buch, 1995). In this context, organizations will need older workers in greater numbers because of their high level skills at adapting to continuous change (Strate & Torracco, 2005). While apparently there is a rise of older workers, contradictory information suggests that organizations are also dismissing older employees regardless of the employees’ desire to remain active workers. According to Pitt-Catsoupes and Smyer (2007), employers should no longer assume that chronological age predicts employees’ career or life stages. Due to the complexity and multidisciplinary nature of issues surrounding older workers a long-term research agenda is required (Rocco, & Thijssen, 2006). Sullivan et al. (2005) suggested that there is a need to reassess factors and strategies related to midlife work transitions and beyond and the facilitation of such transitions. According to Kormanik (2005), there is also a need to identify strategies for promoting positive work transitions outcomes (Heppner, 1998). There is a lack of design of services, development of strategies, and intervention planning that facilitates work transitions of adults (Eby & Buch, 1995). Applebaum, Ayre & Shapiro (2002) noted that succession and retirement planning require organizations to remain involved in career development in order to succeed. Weaver (1987) predicted that there would be an increasing complexity of career counseling and an emphasis on the post-midlife period of career development, including retirement planning. However, “career theories and assessment measures have tended to focus more on career choice and adjustment to initial employment than to adults in middle age or experiencing career transitions” (Heppner, 1998, p.136).

One of the major areas of Human Resource Development (HRD) is career development. As such, HRD is also concerned with the evaluation of systems that foster or hinder individuals’ development, career growth, and

organizational commitment (Rocco & Thijssen, 2006). According to Visser and Beatty (2003), more proactive and specific strategies are needed for organizations to pursue in order to successfully anticipate the new workplace populated with older workers.

The literature regarding aging workers has been narrowly focused, often based on workers' age and planning for retirement. Research studies are often limited in this respect (Whiston & Brecheisen, 2002; Forte & Hansvick, 1999). Russell (2007) suggested the need to identify factors that predict success in finding new employment for the aging workforce. Russell (2007) proposed that career development professionals must take a leadership role in helping organizations and individuals deal with career transitions for older workers. HRD professionals can help organizations align their business policies and practices with the needs of the changing workforce. According to Emerman, Mosner, and Spiegle (2003), employers need to be proactive with their strategies for employee development, retention and transition with the goal of retaining long-term, high-contributing employees. Organizations will have to recruit talent that possesses innovation, knowledge, skills and leadership. More specifically, employers need to see the value of retaining older employees, in order to maximize productivity and competitiveness; HRD professionals can serve as the catalysts for change in organizations by sending the message that employability is not a function of age, but rather the ability to make a meaningful contribution to the employer's business goals and objectives.

This paper examines the phenomenon of aging population and its impact on the workforce and HRD practices, through an exploration of career transition stages of older workers as they approach retirement. This paper provides insights that can aid organizations and HRD professionals in assisting collective and individual needs of older employees in the workplace through their career and work transitions.

## **Theoretical Framework**

Transitions theory was utilized as a theoretical framework for this study. Transitions theory is an adult development theory that provides a way to examine adults in transition (Schlossberg, Waters, & Goodman, 1995). According to Schlossberg, transitions occur when "an event or non-event results in change in one's behavior and relationships" (Schlossberg, 1981, p. 5). Transitions occur in three contexts through our lives: individual life transitions, relationship transitions, and work transitions and can be expected or unexpected (Schlossberg, Water, & Goodman, 1995). Transitions theory assumes that individuals use their coping resources, such as social support systems, for example networking (Schlossberg, 1981) to ensure a positive transition outcome. In a study with retirees, Schlossberg (2005) found that retirement is many transitions and coping with these transitions depends on the role of work and family in the life of the individual, the timing of retirement, the degree to which work has been satisfying, the degree to which retirement is planned for, the expectations one has, the degree to which a meaningful life is established and, one's health and sense of financial security.

Although Schlossberg's (1981) transitions theory has been applied extensively, the existing literature on work transitions has considered the rapid changes occurring in the current workplace environment (Kormanik, 2005). Work transition research has examined anticipated work entry but research on anticipated work transitions in later stages, such as retirement is limited (Pappas, 2000). According to Engels (1995) there is a need to identify general and specific implications for theory and practice working with individuals of all ages and stages of career progression in terms of preventive strategies for career education. Workplace transitions today are increasing and they continue right up to and even beyond retirement (Hiemstra, 1998). The way a person deals with transitions must be embraced by organizations when preparing for reemployment (Russell, 2007). In addition, success of previous transitions can be used as a building block for the future. Williams (1999) offers a psychological perspective of integrating the transitions theory into practice. According to the author, the effects of transitions often transcend the individual's life-work boundary into other roles (Williams, 1999). Factors that enable successful transitions include economic security, emotional security, health, prior transition skills, work environment, transition support, and positive outcomes. Factors that inhibit successful transitions include economic insecurity, emotional insecurity, health, hostile work environment, poor transition management, and negative outcomes (Williams, 1999). Age discrimination affects the older worker (Goldberg, 2004; National Academy, 2004). Charness and Czaja (2006) proposed that employers need to become part of the solution by refocusing from age to transferable skills and strengths.

The observations made above suggest several ways of integrating the existing theory into practice. Because transitions transcend the individual's life-work boundary, a career crisis can have serious ramifications for family members, and personal life transitions can disrupt work performance. Transition management programs need to consider these interactions (Williams, 1999). Schlossberg's approach is relevant to this because it provides the basis to understand the situation, support, the self, and strategies that can be used in transitions (Williams, 1999). The

challenge is to spread transition awareness and management skills to employers and the general population (Williams, 1999). Schlossberg's transitions theory helps to understand all the factors that affect positive outcomes for older workers and develop appropriate programs to avoid unsuccessful transitions to either continue working or retiring. This paper explores ways in which organizations and HRD professionals can help individuals survive and thrive through transition situations successfully.

## **Research Question**

As a first step towards gaining a better understanding of the phenomenon of aging population and its impact on the workforce and HRD practices, this study explores career transition stages of older workers as they approach retirement. Three research questions guided this study: What is the state of the current aging workforce? What influences the choice for career transition in older workers? And what contributes to successful career transitions for older workers beyond retirement?

## **Research Methods**

A comprehensive literature review was conducted using the descriptors "career transitions", "career exploration", "retirement" and a combination of the three descriptors. With the exception of seminal works, most of the sources cited were less than five years old. The databases used were Business Source Premiere, Academic Source Premier, Psychology databases (specify), ERIC and key journals related to HRD, Organization Development and Career Development. The literature search yielded books, conference papers, dissertations, refereed and non-refereed articles, magazines, government reports, and online sources. Due to the interdisciplinary nature of this topic, sources were chosen based on scholarly relevance and content relevance. Manuscripts themselves often revealed additional sources for research, which were pursued using the method noted above. The emergence of patterns and themes resulted from an inductive analysis of the literature, and the initial research question went through iterations of refinement as part of this process.

## **Results and Findings**

The intent of this study was to explore the current state of the aging workforce, explore what influences their career choices and explore the contributing factors of career transition stages for older workers beyond retirement. Through an inductive analysis of the literature three core themes were uncovered: planning for retirement, providing alternatives to retirement, and developing strategies for dealing with career transitions of older workers. Results shown can aid organizations and HRD professionals in assisting collective and individual needs of older employees.

### *Planning for Retirement*

It is expected that by the year 2010, more than fifty percent of the U.S. workforce will be forty or older (Emerman, Mosner, & Spiegle, 2003). A direct implication is the increase of retirement numbers (AARP, 2004). According to Hiemstra (1998), the traditional route to retirement for many people is working for an employer, or even various employers, until the traditional retirement age. This on-time transition can often be anticipated and appropriate educational programs chosen or selected in preparation, such as pre-retirement planning, means for developing new interests, information about travel opportunities, and special training for paid or volunteer activities in various community settings. It appears then that "the overwhelming majority of both men and women have voluntarily or involuntarily left full-time employment before they have even reached age sixty five" (Monk, 1994, p. 5). There are several problems related to retirement planning that need special mention. For example, from a psychological perspective, a variety of losses can accompany transitions in the workplace or out of the workplace. A large group of corporate middle-management employees said that they "miss their friends and co-workers, the substance of their work, the contribution they are making, the opportunity to learn and travel, new challenges, being part of a respected company, working as a team member, and helping the company grow" (Dennis, 1994, p. 46). Another problem is related to economic reasons. For many individuals with lower salaries, reduced income will be an additional important loss. Social security long-term viability will not replace full-time employment income (Munell, Sass, & Aubry, 2006) and pension plans often fall short of actual retirement needs (Munell, et al., 2006). In order to successfully plan for retirement, Hiemstra (1994) recommended that retirement planning programs, assistance supplied by companies or community agencies, and other support such organizations as churches, can be utilized to make many of the transitions positive. Even with planning, individuals in this age range will experience difficult times during periods of transition, whether it is forced change such as an unexpected career interruption or

the normal on-time transitions of planned retirement. Such individuals may need educational support of various types to facilitate the change (Hiemstra, 1994).

At least seventy nine percent of the older population is considering work as they approach retirement age (AARP, 2007). About thirty percent of Boomers planned to work for enjoyment while twenty five percent planned to work for the income. About sixty percent of Boomers were confident in their ability to plan for retirement (AARP, 2007). There are other reasons involved besides economic. An example of this is that the baby boomer generation is questioning the meaning and purpose of the work and their lives as they go through mid-life (Chalofsky, 2003). This dissatisfaction seems to be persistent according to Kalb and Hugick (1990). In a study conducted by Knörr (2006) on career advancement for women who had attained top management positions, participants suggested that meaningful and more fulfilling work experiences motivated and influenced their choice to continue to work even beyond retirement. HRD professionals must listen to an emerging construct of meaningful work (Chalofsky, 2003), while this becomes even more relevant as the worker approaches retirement.

#### *Providing Alternatives to Retirement*

According to AARP (2007), some employers are already becoming innovative in addressing the challenges and opportunities of the aging workforce. Best practices include programs that attract and retain older workers and address their future needs. This is particularly relevant for industries that currently experience labor shortages such as healthcare, utilities, education, and engineering. In planning for retirement, organizations are offering programs to support the maturing workforce, show appreciation for longer service, recognize mature worker issues, support family care needs, sponsor formal or informal arrangements allowing long-tenured and older employees to reduce work hours without jeopardizing their benefits and emphasizing career-long training (AARP, 2007).

The U.S. government is encouraging individuals to take on new careers at the traditional retirement *age* (Kadlec, 2007). This allows workers to utilize their accumulated skills and knowledge while alleviating the debt that would accumulate when retirees tap pension and health care resources (Munell, et al., 2006). Fields that are currently offering paid, flexible work for those over fifty include education, health care, nonprofits and government. Older job seekers are welcomed in health care, teaching, consulting, retail, customer service/customer relations, and small business (Sumser, 2006). Individuals that are able to apply their career background in the classroom are particularly in demand. Consulting seems to be a good fit for older job seekers whether one works as independent contractor or as part of a consulting firm, because ample opportunities are provided in which past experiences and wisdom are valued. In the retail sector there is an increasing demand to hire seniors (as managers, sales associates, marketing and merchandising executives), due to an increasing need to appeal to an older customer base and the need to accommodate the demographic makeup of the stores (Sumser, 2006). This is done with the assumption that older generations have a better understanding of how to deliver superior customer service. Finally, small business welcome those who have highly qualified corporate experience because they considered very valuable assets (Sumser, 2006).

According to AARP (2007) another option beyond retirement is self-employment. Findings from a substantial study conducted by AARP revealed that nearly one-third of older self-employed workers made the transition to self-employment at age fifty or beyond. This same source suggested that employers are interested in learning about and implementing policies that attract older workers and create a supportive work environment. Employers who adapt their workplace will likely find themselves better positioned to harvest the benefits of this potential resource.

#### *Strategies for Dealing with Career Transitions of Older Workers*

While some employees may leave work voluntarily, for other employees who leave work involuntarily at an older age is more difficult to find a job. "Unemployment and layoffs force people to look for new jobs generally at lower wages and tend to encourage older workers to elect to withdraw from the labor force rather than remaining unemployed and continuing to search for a new job" (Clark, 1994, p. 33). Bass and Oka (1995) explained that resistance exists to hire older workers. Several strategies that help older workers dealing with transitions were identified in the literature. For example, Hiemstra (1998) addressed the role of continuing higher education as a strategy to reduce stress through transitions. According to this author, how employees are trained has implications for their future. AASCU (2006) noted that higher educational institutions can serve adults in transitions by providing a reasonable means of assessing prior learning that may be counted toward degree requirements, or become the focal points for discussion in employee-employer talk sessions organized by higher educators, or be the providers of job counseling or retraining programs. Other strategies include employee assistance programs, counseling services, training centers, and technological support mechanisms that are often available. Individuals and their families can be encouraged to participate in various support groups that exist in the community. Other educational strategies can be used successfully. Senge (1990) talked about the notion of an organization as a learning community and the core disciplines needed in building the learning organization, such as personal mastery efforts, the use of mental models, efforts at shared vision, and team learning, as critical to facilitate employees being a part of the process of change

required for organizations to survive in today's global economy and information age. Any of these strategies can be used to help people build mutual support groups for dealing with transition (Hiemstra, 1998). Waitley (1995) also talked about the importance of autonomy and individual empowerment for employees. Bowerman and Collins (1999) suggested the use of coaching, and mentoring to promote personal transformation. This is particular relevant for older workers because as Deems (1995) posed, in any transition employees must be helped to keep positive attitudes. In assisting the worker become better equipped in anticipating change, practitioners can aid individuals view change as opportunities for advancement, and the acquisition of new knowledge; they can help with stress-management strategies, take appropriate corrective ideas to the right decision-maker; connect individuals involved in a transition so they can communicate, and look for ways to increase productivity (Hiemstra, 1998). Russell (2007) advocated that in preparing older workers for transitions, programs should incorporate knowledge about self, past work experiences and future, which is the foundation for future action, and include interest and skills selection, especially transferable skills. In addition, assessments, formal or informal, can be helpful if interpreted in a way that brings past and present together in a reflective and proactive way (Russell, 2007). Activities that focus on positive memories and narrative stories, realized dreams and future visions are powerful when used by individuals or in groups, because they can help focus on future options (Butler, Mason & Russell, 2003). Of special relevance is how informal knowledge is measured and understood (Davenport & Prusak, 1998; Imel & Kerka, 1992; Rowden, 1996). Marsick and Watkins (1990) sustained that informal learning in the workplace represent a neglected but crucial area of practice that we need to consider to better understand and respond to the needs of employees. Career exploration can be used as a strategy to anticipate future transitions. According to Bowness (2006), organizations can greatly benefit from programs that offer career exploration for employees because it helps individuals be more competent decision makers as they search out a career or take the appropriate steps to explore new career opportunities. Finally, the use of instruments that assess future career changes, such as the Motivational Appraisal of Personal Potential (MAPP), can be useful in providing information for choosing good tools for self-improvement and self-enrichment as well as information about, strengths, weaknesses, and personal interests that might be used in the future (Whitacre, 2005). Career choice and development are influenced by multiple factors: personality (including vocational interests); how individuals perceive themselves and the world (self-concept, racial/cultural identity, world view); socialization; resources (financial, information, role models, social support); experiences of sexism, racism, and the salience of various life roles and identity. The complex interaction of these factors affects individuals' readiness to succeed. Betz and Fitzgerald (in Leong 1995) recommended that in order to help employees career counseling must take place within the cultural context, with counselors being aware of their own and others' cultures; assumptions that all individuals in a culture have the same values, goals, and experiences should be avoided; race, age, and ethnicity must be considered in interaction with gender and class; and last, the level of acculturation and stage of ethnic identity development should be identified.

## **Conclusions and Recommendations**

The major contribution this study made to the already existing body of knowledge of HRD was its unique examination of contributing factors to career transition stages for older workers. Transitions theory (Schlossberg, 1981) provided an adequate framework to investigate and understand the process of transition for older workers. Transitions in the workplace will continue to occur in the near future but motivation to grow from such changes and to value them as life experiences with positive results depends heavily on the understanding of a skilled professional (Hiemstra, 1998). Findings in this study reveal two major areas in which HRD professionals can aid organizations become successful in dealing with older workers. First, HRD professionals can help in the process of planning for retirement by acknowledging the major areas that affect a successful retirement. These include planning for financial security, dealing with emotional and work related losses, and looking for meaningful experiences among others. Second, HRD professionals can work closely with organizations and provide alternatives to retirement by linking organizational goals with individuals' needs. Attracting and retaining older employees can be of particularly benefit for industries with labor shortages such as healthcare, utilities, education, and engineering. HRD practitioners can aid organizations become more competitive in using older workers' talent, motivation, innovation, knowledge, skills and leadership. Specific programs that support a mature workforce, show appreciation for longer service, and address family care needs, flexible schedules without jeopardizing benefits and career outcomes are needed (AARP, 2007). HRD can help determine ways to link formal education with informal learning, work more closely with business and leaders to share information and success stories regarding workplace transitions, and create a setting that is conducive to sharing ideas and information. Svendsen (1997) addressed the need for new workplace models that address work as a way of production, development and individual and social satisfaction. Finally, organizations can utilize several strategies for work transitions for those who re-enter the workforce. For example, continuing

higher education can provide appropriate certifications needed for future career moves, adequate training, and assessment of prior learning. Other strategies include counseling, coaching, and mentoring. More specific strategies include the use of programs targeted at individuals' self-knowledge, skills, and transferability of such skills. In addition, career exploration might be a useful strategy to further explore new career opportunities beyond retirement. Special attention should be given to factors such as personality, self-concept, socialization, resources, experiences, roles and identity. Finally, the use of instruments that can assess future career changes aid older workers in their search for alternatives. A major limitation of this literature review is its major focus on the baby boomer generation from the U.S. Future research studies can address an existing gap in the literature of older workers related to gender, ethnic differences, and in other countries as well. Future research may also address job specific differences such as within government, the private sector and non-profit organizations.

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