

## AN INTRODUCTION TO RETIREMENT OF OCCUPATIONAL THERAPISTS

Montana Mullane, MScOT 2017 Candidate and Alana Pontone, MScOT 2017 Candidate

Supervisors: Sue Baptiste, OT Reg. (Ont.) and Elizabeth Steggles, DipOT

### ABSTRACT

**Purpose:** Occupational therapists' role includes helping individuals to transition into retirement. However it is unclear how occupational therapists themselves experience this transition and life stage. **Methods:** A literature review was conducted to explore peer-reviewed and grey literature on the research topic. A survey was designed but not disseminated due to unforeseen circumstances. Through semi-structured interviews with individuals planning for retirement or currently retired from the profession of occupational therapy we identified common themes and experiences. **Results:** Many themes emerged such as use of title and identity. Based on suggestions made throughout the process, recommendations were proposed to the Canadian Association of Occupational Therapists (CAOT) Retired Member Network to benefit individuals retiring or retired from the occupational therapy profession. **Conclusion:** There are clear opportunities for the CAOT to support retired members.

### INTRODUCTION

Retirement is a life transition that may be welcome or challenging and it may be planned or unexpected. Each individual's retirement experience is unique, as retirement is impacted by factors both external and internal. Social networks, financial state and health status are all commonly cited issues affecting retirement (Bradley, 2001; Jonsson, Josephsson & Kielhofner, 2001). The process of retirement for occupational therapists may be different from other professions and requires consideration. Occupational therapists are knowledgeable about life changes and skilled in identifying meaningful occupations but retirement is not a straightforward process. This experience has not been explored to date but, given the number of baby boomers expected to swell the ranks of the retiree population over the next two decades, this is quickly becoming an important concern.

The Canadian Association of Occupational Therapists (CAOT) Retired Member Network was formed in May 2016. The Retired Member Network identified 5 main objectives (see references) to reflect the needs of all OTs considering retirement or already retired. The Network, therefore, sought to improve its understanding of the transition experience of occupational therapists and determine how the Network could better support them.

### LITERATURE REVIEW

As lifespans increase, individuals are spending a larger proportion of their life in retirement (Price, 2000) and retirement norms are shifting away from the concept of mandatory retirement at age sixty-five. Many individuals are opting to remain in the workforce longer (Cook, 2015). As the nature and duration of retirement changes, supporting the transition to retirement becomes even more important. Retirement is a time of role and occupation loss (Price, 2000; Jonsson et al, 2001, Teuscher, 2010). Research shows that preparing for retirement requires much more than the standard financial preparation and that a positive experience of retirement is linked to occupation. Individuals need to undergo an activity exchange (Pettican & Prior, 2011) which is more than simply filling time or keeping "busy" (Loe & Johnston, 2016). The individual must find occupations that they find personally engaging; that require intensity and a clear set of activities (Jonsson et al., 2001). One's attitude towards retirement and the values attached to one's profession or work impact the retirement experience, predisposing one's trajectory in a positive or negative manner (Jonsson, et al., 2001; Teuscher, 2010). Research indicates the importance of one's work in determining self-identity (Wijeratne, Earl, Peisah, Luscombe & Tibbertsma, 2017; Pettican & Prior, 2011; Teuscher, 2010). Retirement often impacts established social networks and retirees may struggle to replace the social interactions and relationships that had been inherent in the workplace (Jonsson et al. 2001; Price 2000). It is important to acknowledge the diversity of retirement experiences. Cook (2015) suggests viewing retirement as a "redirection" rather than a transition, as individuals are redefining their identities and pursuing new occupations. Retirement is simply a new direction rather than an end to the central working stage of one's life.

### METHODS

To gain thorough understanding of the transition to retirement and retirement of occupational therapists a complex methodology was developed. A phenomenological approach was determined, as the aim was to understand the experience of occupational therapists as they undergo the diverse experience of retirement.

A semi-structured interview was designed and conducted with purposeful recruitment of retired occupational therapists through the CAOT Retired Member Network and those outside of the Network identified through project supervisors. Twelve semi-structured interviews were conducted over the telephone with members (seven) and non-members (five). The participants were located in various provinces across Canada, and in various stages of retirement, increasing the potential generalizability of the study findings.

All participants provided verbal consent for the interviews to be recorded for the purpose of transcription and review during the research process. The interviews were conducted in a conversational style, utilizing six pre-determined and structured questions; each interview lasted between 20-40 minutes in length. The order of the questions was flexible in order to ensure the interview flowed more organically. One student occupational therapist facilitated the interview while the other recorded the discussion and completed field notes in a reflective diary. The second student occupational therapist also extrapolated recommendations as they emerged throughout the interviews. The interviews were transcribed by an independent third-party before being coded and themed independently by both student occupational therapists before comparison and consensus were undertaken and accomplished.

## RESULTS/DISCUSSIONS

A total of 6 common themes emerged throughout the interview process. The themes identified were: transition period or planning; social connectedness; use of title and identity; involvement with occupational therapy; finances; and advocacy. Five supportive recommendations were affirmed or offered to the CAOT Retired Member Network. These include: network recruitment; network meetings; retirement preparation; opportunities; and engagement in the profession. Limitations included gender and selection bias, and technical faults which were accounted for.

## CONCLUSIONS/FUTURE DIRECTIONS

Retirement is a stage of life in which many facets are considered prior and throughout. The expectations and experience of retirement vary between individuals but there are many common aspects. For those retired from the occupational therapy profession, there are many common challenges that can be acknowledged by the CAOT. A number of recommendations were suggested to better the experience of retirement for these individuals and those approaching retirement.

## ACKNOWLEDGEMENTS

To our supervisors **Sue Baptiste** and **Elizabeth Steggle** for their support and guidance throughout the research project. To the members of the CAOT **Retired Member Network** for welcoming and willing involvement. To **Ryan McGovern** and **Julie Lapointe** from the CAOT for support throughout the research process. To **Stacy Maskell** for completing the transcriptions of interviews. To **all of our participants** who shared their experiences and insights.

## REFERENCES

- Canadian Association of Occupational Therapists. (2016). *CAOT retired member network*. Retrieved from <https://www.caot.ca/site/pd/otn/rmn?nav=sidebar>
- Cook, S. L. (2015). Redirection: An extension of career during retirement. *Gerontologist*, 55(3), 360-373. doi: 10.1093/geront/gnt105
- Jonsson, H., Josephsson, S., & Kielhofner, G. (2001). Narratives and experience in an occupational transition: A longitudinal study of the retirement process. *American Journal of Occupational Therapy*, 55(4), 424-432.
- Loe, M., & Johnston, D. K. (2016). Professional women "rebalancing" in retirement: Time, relationships, and body. *Journal of Women & Aging*, 28(5), 418-430.
- Pettican, A., & Prior, S. (2011). 'It's a New Way of Life': An exploration of the occupational transition of retirement. *British Journal of Occupational Therapy*, 74(1), 12-19.
- Price, C. A. (2000). Women and retirement: Relinquishing professional identity. *Journal of Aging Studies*, 14(1), 81-101.
- Teuscher, U. (2010). Change and persistence of personal identities after the transition to retirement. *The International Journal of Aging and Human Development*, 70(1), 89-106.
- Wijeratne, C., Earl, J. K., Peisah, C., Luscombe, G. M., & Tibbertsma, J. (2017). Professional and psychosocial factors affecting the intention to retire of Australian medical practitioners. *Med J Aust*, 206(5), 209-214.