

NAVIGATING THE **RETIREMENT JOURNEY**

Insights and tips from partners

By Kevin O'Rourke, Mike Garvey, and Frank Benest



As one partner of a retiring local government manager knowingly reported, “No matter how much people love each other, the change of suddenly having your partner around fulltime can create strains.”

With this statement in mind, how do partners and children deal with the transition when a manager in the family steps away from a full-time local government career and moves into his or her next life phase? From the perspectives of the partner and children, what are the positive opportunities and the not-so-positive struggles?

And for those who have experienced the retirement transition, what tips do partners and children have for other families who may now face similar adjustments?

These were some of the questions that the Cal-ICMA Encore Committee sought to address during 2017. To gain insights for this article, the committee requested comments from seven partners and several teenage or young adult children.

The key takeaway from all the informants was that the transition was a big adjustment, not only for the retiree but also for the partner and any children still in the household.

The Partner’s Perspective

Partners described a diverse set of new opportunities and benefits as retirees moved into their next life phase:

Less stress. As the manager in the family retired from a full-time job, the manager’s partner perceived that the retiree was less stressed out. The partner found that the retiree had more time for family, children (often adult children), and friends.

Passionate pursuits. While the retiree had more time to travel, do home projects, and pursue hobbies, the big advantage to this “encore” phase was that the retiree could engage in passionate pursuits (e.g., cooking, photography) that were energizing and engaging.

Travel. Partners appreciated the opportunity to be able to travel with the retirees. Several partners described planning trips or quick getaways in anticipation of retirement, so they had something to look forward to once the manager had left his or her position.

Caring for grandkids and elderly parents.

Several partners said that retirees were finding great joy in caring for grandchildren, grand nieces and nephews, or a dear household pet.

A key developmental need at midlife is what the psychologist Erik Erikson calls “generativity,” which is the opportunity to care for, support, and guide the next generation. The opportunity to occasionally or regularly care for others seems to fill this need and bring joy to many retirees.

While often challenging, some retirees offered care for an elderly parent as part of their new portfolio of experiences and opportunities.

Focusing on health. Many retirees began to focus on healthier lifestyles. They improved their diet, joined a fitness center, exercised more, and took walks. Retirement also allowed them to take care of any ailments or health problems or to support a partner who was experiencing health issues.

Reconnecting as a couple. If one is in a marriage or other long-term relationship, it is common to get distracted. By midlife, many of us become “lop-sided.” Kids and career distract us, and we may not adequately nurture our love relationships.

Consequently, couples may need to consider how to reconnect. There is now more opportunity to spend time together and share activities that both may enjoy—cooking a meal together, taking a walk, traveling, going to the movies, or working out.

The Perspective of Adult Children

Some of the retirees still had teenagers or adult children living at home. The children also experienced these positives:

- The retiring parent was home more, could set his or her own hours, and had more time to do things together that the parent and children enjoyed. One teen concluded that her dad now “could get more out of life” than just work, work, work.
- The children also perceived and appreciated that the retiree was less stressed. The retired parent was now more “present,” listened more, and was generally more supportive.
- The retiree had more time to help the children at home with homework or other challenges; or to help the adult children relocate and re-establish themselves in another locale, even out of state.

One child said that her father was not as available as she had hoped. In fact, she advised other children of retirees to not think that their retiring parents are done with their profession once they retire. Local government management is part of who they are, with many attachments. Some retirees will find that they cannot just walk away; they continue their local government involvement through consulting, training, or teaching.

The Challenges

One of the not-so-positive challenges was that the partner had to adjust to the retiree being home most of the time. Even though he or she may be working on their own projects or passionate pursuits, the retiree often got more involved in the partner’s routine and offered unwanted advice on household activities (previously more the domain of the partner).

Some of the partners fondly remembered their alone time before the retiree was home all day. One partner reported that she and her husband had to learn how to spend more time together, especially on days when nothing was planned.

While the teenage or young adult children were grateful for the new attention and support from the retiree, they too did not want or appreciate the greater involvement in their choices and advice on all matters.

10 Tips for Enhancing the Transition

Partners offered these tips on how to get through this transition with their newly retired manager:

1 Help your partner take a deep breath and reflect. Sometimes it took the retiree a good six months to learn how to take a deep breath. All the partners indicated that the retiree needed time to decompress. It is perfectly reasonable for the retiree and his or her partner to let things unfold and not have everything planned out in advance of the transition.

To help the retiree reflect about encore opportunities, partners might encourage conversations based on such questions as:

- What encore activities (paid or unpaid) would engage and energize you?
- How could you experiment with these activities or pursuits? How can I be of support to you as you explore or pursue these pursuits?
- If you desire to maintain some connection with the profession, how would you explore these opportunities?
- Are there colleagues or ICMA Senior Advisors who could help you think about opportunities to stay in touch?
- With whom do you want to reconnect (parents, older adult children, other family, friends)?

A fulfilling encore journey is created over time with many twists and turns. Partners may wish to have a number of conversations with their retiree before and during the transition about the opportunities, challenges, and adjustments posed by the transition.

A fulfilling encore journey is created over time with many twists and turns.



2 Encourage a creative pursuit. Because people can get distracted by kids and careers in their adult years, they often abandon some creative pursuit or activity that is truly enjoyable. Suggest that the retiree experiment with a creative activity, perhaps by taking a class or two, and rekindle that creative spark.

3 Don't retire at the same time. If both partners are still working, partners recommend that one of them maintains his or her job. Consider having two to four years between the two retirements. Once the first partner retires and figures out his or her encore, it will then be time for the other person to do the same.

4 Identify common activities. With your retiree, think about activities that can be mutually enjoyable. One of the contributors to this article suggested: "If only one of you plays tennis or cooks, get lessons for the other—if there is any interest. As one partner stated, "Joint routines and activities keep you connected."

While couples want to allow for spontaneity, it is a good idea to plan some joint activities. Let each other know of your schedules so you can plan a meal or walk together. Also, let your partner know when you are *not* available.

5 Respect and honor differences. Retirees and partners will have individual interests and activities. Allow for them. One retiree may want to play golf every Sunday morning with friends, while the other may want to use the time for other interests.

One of the partners interviewed provided the following advice: "If one of

you adores having the television on for amusement or education and the other loves quiet time, music, or meditation—buy some quality Bluetooth earphones. It could save the marriage!"

6 Be vigilant about respecting each other's individual routines and "territories." Check in on a regular basis about respecting the different routines and projects that individually engage you. If you enjoy shopping alone for dinner, for example, or preparing the meal alone, certainly let your partner know.

7 Encourage your partner to reach out to colleagues and stay connected. One's professional identity as a local government manager is typically strong. A retiree may feel a bit lost in this transition to their next life phase.

If he or she feels interested, suggest that they reach out to former colleagues for coffee or lunch, golf, or other activities. This will help the retiree stay connected.

Because of one's strong identity with the profession, the retiree may desire to continue some type of work that is related to local government management—as an interim manager, consultant, or university professor. As one partner reported to us:

"A saving grace of my partner's early retirement—from my perspective—was the occasional interim city manager or general manager position that came up. The interim jobs kept him busy, used his skills in helping out an agency or city in trouble, and brought in extra money for vacations and home improvements. A side benefit was that we had more experiences to share to enliven our conversations."

8 Help the retiring manager consider opportunities to serve. Service is typically part of the retiree's DNA. Integrating some service into the person's portfolio of encore activities helps any retiree stay engaged.

The service could take many forms: coaching emerging leaders (through the ICMA Coaching Program or the ICMA Emerging Leaders Development Program), volunteering at your grandchild's school or at your church, or serving on a nonprofit board.

9 Suggest that your partner get a peer coach. Encourage your retiree to get an informal peer coach or adviser for his or her encore journey. Cal-ICMA has a listing of peer coaches who have already experienced the joys and challenges of the transition and are willing to offer feedback on the encore plans of your partner. ICMA senior advisers or state liaisons are also great advisers. (See a list of former managers who have volunteered to serve as peer coaches at <https://icma.org/encore-manager-senior-manager-resources>.)

10 Get healthy. Support your retiree in any efforts to get healthier, mentally and physically. Going on walks or jogs together, preparing healthier meals, and gifting a gym membership are all ways to encourage a healthier lifestyle. As insufficient sleep is a hallmark of a career in local government management, you can also encourage your partner to sleep more and to nap.

BONUS TIP Get a buddy. Either through the ICMA Partners Program or through any connections with other partners that have been made over the years, reach out and reconnect with someone in your similar position. (The Partners Program webpage at ICMA's website can be accessed at <https://icma.org/icma-member-partners-program>.)

Another partner who is going through a transition—or has recently gone through this phase with a retiree—can serve as a wonderful sounding board.

Lending a Hand

It may be difficult for the retiring manager when retreating from his or her “I'm in charge” role. Managers need help in making the transition. They may be

Resources

To support managers who are thinking of their next life phase and those who have already begun their encore journey, the Cal-ICMA Encore Manager Committee has developed these support programs:

A webpage on the Cal-ICMA website (<https://icma.org/encore-manager-senior-managers-initiative>) provides information and access to all services and resources. The website has links to:

- One-to-one peer coaching matchups. Those interested in peer coaching can review the profiles of encore managers who can provide advice for those wanting to explore consulting, teaching, interim management, nonprofit service, or other opportunities.
- “My Journey” vignettes, including tips and lessons learned, are also posted on the website.
- A resource list that includes books, articles, and other websites.
- In addition, the Encore Committee has produced five how-to papers (all five can be accessed at <https://icma.org/cal-icma/encore-manager-senior-manager-resources>) to assist managers who want to pursue different paths:

“So, You Want to Be an Interim Manager?”

“So, You Want to Be a Consultant?”

“So, You Want to Be a University Professor?”

“So, You Want to Be a Non-Profit Executive?”

“When Do I Know It's Time to Leave?”

emotionally spent and ready to retire but still have a lot of energy that needs to be directed into positive outlets.

Any such pursuits can be paid or unpaid, professional or personal. The key is for the activity to be engaging for the retiree and therefore energizing.

This transition into one's next life phase is an opportunity to reinvent one's relationship with his or her partner, adult children, grandchildren, parents, and dear friends. If an individual takes the relationships for granted and doesn't reinvest in them, that person may lose the opportunity to create a fulfilling encore.

An individual's transition into a next chapter in life is a journey: people might know the general direction but not the precise destination. As one contributor to this article suggested:

“Encourage your partner to be okay with *discovering* and *exploring*

(not just *knowing*)! Local government managers are required to know—the goal, the analysis, the options, the plan. Encourage them to enjoy the opposite—not knowing exactly what they may want to do—and the spaciousness that comes with it.”

Finally, as one partner advised, “Breathe in, breathe out, and move on together.” Share in your partner's encore and enjoy the adventure. **PM**



KEVIN O'ROURKE, Fairfield, California (kevin@

kolgs.com); **MIKE GARVEY**, San Carlos, California, and ICMA state liaison, Northern California (garveycgs@yahoo.com); and **FRANK BENEST**, Palo Alto, California, and ICMA Liaison, First Generation Initiatives (frank@frankbenest.com). All served as local government managers in the state of California and are ICMA-CMs.