

NEW ROLES, FEW RULES:

PLANNING FOR PURPOSE BEYOND POSITION

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“If you want something new, you have to stop doing something old.”

—Peter F. Drucker

INTRODUCTION

Test your knowledge: How much do you know about the transition to “next”?

Patterns of “next” stage life transitions among the increasing wave of long-term nonprofit leaders reveals new lives of commitment that also (finally) balance work/service and family/personal priorities. True!

In the months and/or years after leaving their long-term positions, leaders worry less and enjoy life more! True!

When you leave your leadership position you’ll never find anything so fulfilling! False!

Most leaders move into an encore stage of work—often because they need the money, but also because they are “serving” their lifelong aspirations to make the world a better place. True!

Even in your new life you will need to make room for the constant needs of your “old” organization for lots of ongoing close communication, advice, trouble-shooting. False!

Life at this stage—like any other—is about the journey as much as the destination. True!

Nobody said it was easy ... True!

Sometimes research is like asking everyone to answer at once and then getting a response so loud and resounding that it takes a long time to make sense of it. The hundreds of social sector leaders near, in or just past their transition out of long-term leadership positions who responded to the Life After Leadership inquiries have produced that kind of echo chamber. Their voices tell a big story with many subplots about what is happening in the social sector nationally and at the community level as we begin to absorb an immense generational transfer of talent that is getting underway.

The Life After Leadership Project began interviewing leaders about this transition in 2012 and collected information and reflections from over 600 participants through extensive interviews, surveys and focus groups. **New Roles, Few Rules**, the third in a series of reports, tells a vivid story about the transition out of formal leadership and into something new for the current generation of long-term nonprofit executive leaders who have built and often founded their organizations. It also offers leaders who are leaving their executive positions a framework of hope for what their new life will look like without sugarcoating some of the risks and decisions along the way.

The Project’s first report, published in 2012—**The New Lifecycle of Work**—documented the major generational changes underway in the social sector and the pattern of long-term social sector leaders choosing to leave their jobs yet continue working to solve social problems. The second report, published in 2013—**The Leadership in Leaving**—challenged leaders and organizations to redefine executive exits as serious and strategic acts of leadership and manage them with clear decisions, appropriate planning and organizational support.

New Roles, Few Rules explores how leaders plan and land in new roles likely to redefine their familiar notions of leadership as they enter their next stage of life. It begins with success stories and then tracks back to share how hundreds of research participants say they are finding their way. At the end of the report there is a reader's bonus: At the end of the report, you can use the starter tool of templates for thinking about getting to a next-stage-of-life transition ("5 Forks to Go").

The scale of the generational change explored in these reports will transform the social sector. It has been estimated that baby boomers (those now 50 and older) hold as many as 87% of the CEO and leadership positions in the United States' nonprofit, philanthropy and volunteer service organizations. The 2012 Social Sector CEO Trends report from the University of Washington documented that percentage in its survey respondents and found 59% were over 55. In less than two more decades, most of these boomer-generation leaders are likely to change their lives and move out of their formal leadership roles and into a different life ... a "next" or "encore" stage of life, a new chapter of work/service.

Embedded in the exit of one generation of leaders is considerable good news awaiting the next generations. First, the "transfer of talent" of the top executives out of their positions will create some much-needed mobility for young leaders in the social sector to take charge and innovate through their own vision and lens of change. Second, because the exiting leaders have declared their determination to keep working for the social good, they offer human capital to help the next generation succeed. Finally, because they are fashioning new roles within a better-balanced personal lifestyle, they are in effect clearing a pathway for a different life trajectory for all. As all leaders in the sector watch the boomer leaders elongate their social service work into their 70s and beyond, they can begin asking whether a longer working life can take the pressure off squeezing a career into 40-45 years. A longer work trajectory could reduce the need to overwork throughout the young- and mid-adult years that also are filled with so many other demands from family and community, according to author Laura Castnson, who also suggests that it offers the possibility of working at a different pace over a longer time frame.

The main story in **New Roles, Few Rules** is that this exit or "transfer of talent" is freeing a generation of older leaders to advocate or serve the causes, organizations and communities they care about. As they fulfill their own goals, giving up enormous institutional responsibilities, they have more time for themselves and also for the hands-on work that communities need. But this availability of time—when multiplied by a generation—ultimately raises new questions about how communities and organizations will prepare to make the best use of all the encore seekers coming their way. At its core, **New Roles, Few Rules** is about both how the individual leaders can plan and make better choices for a successful landing into their own great next stage of life and how all those individuals doing so accumulate into a wave of social and cultural change, including a new context and new opportunities for next generations, communities and the social sector.

PART 1: FROM A DISTANCE IT LOOKS SO EASY ... BUT HOW DO LEADERS REALLY “LAND” SUCCESSFULLY AFTER LONG-TERM CAREERS?

The anecdotes and success stories are beginning to pile up about increasing numbers of boomer-generation leaders reigniting their aspirations for success and new roles in “life after leadership.” Part 1 of **New Roles, Few Rules** examines how we envision and define this successful moment, including what we call it. Even while the vocabulary is not yet standardized (making it more difficult for some to grasp or create), the choices of many individuals are settling into identifiable patterns for actual options and opportunities. To complete the picture of what it means to “land,” this section presents real-life stories of a few leaders who are emblematic of what is happening out there.

The Challenges of Future Vision and Transition Vocabulary—You Can Do It If You Can Articulate It.

Leaders exiting now are on the irregular and somewhat chaotic front line for change. As they begin reaching a point near the exit from their current leadership roles they are using different language to describe their vision of “what’s next.” Until recently, the only cultural consensus for imagining and describing this later stage in life was “retirement,” and everyone had a pretty good, if vague, picture of what that meant. At least most people had heard and used the language of retirement as a “golden years” sort of idea about leaving a working life for leisure. For some people, a simple “golden years” ideal still remains the goal. But our research confirms this is not so for the vast majority of social sector leaders: 97% of our survey and interview respondents rejected the idea of traditional retirement for their future.

Moreover, even when people from all walks of life say they are “retired,” their description of what they are actually doing bears little resemblance to the traditional retirement dream. They are launching new businesses, trying out new jobs, going back to school, volunteering, and organizing larger social change and advocacy efforts ... just for starters! And while it was easy for our respondents to tell us what they don’t want, it was more difficult for them to find the words to describe what they do want. The 97% for whom the golden years’ vision couldn’t be less attractive indicated they expect to have lifelong work for a meaningful purpose, but they call this new stage of work by many names and they have different ideas for how to achieve it.

Most long-term social sector leaders in transition are striving to achieve the vision that Encore.org has described as “second acts for the greater good.” The Life After Leadership respondents offered different words for their experience.

A few of the terms that surfaced as people tried to express their aspirations included:

Commonly Used Term	Definition or Widely Understood Meaning
Encore stage of work	A new stage of paid or unpaid work in the second half of adulthood focused on solving social problems or meeting community needs. Encores offer purpose and, for those who need it, income and/or benefits. An encore stage of work is growing in cultural recognition as a term. See www.Encore.org .
Post-career work	Usually a temporary and less formal work commitment or a series of short-term commitments to pursue professional interests after completing a long-term career.
Dialing down	Cutting back, reducing stress, focusing and/or re-balancing life and work; replacing the “fast lane” of the long-term career with something else—purposeful but more manageable. When done without changing employers, this is sometimes called “phased retirement.”
Retirement	Most commonly used to mean leaving one’s main career of paid work; typically with expectations of other lifestyle promises—relaxation, leisure, freedom, etc.
Purposeful work	Paid or unpaid work that carries personal meaning and value. Often people express “purposeful” work as the desired goal for the encore stage of life and work.

The words may differ but they all describe an effort to redefine boundaries between work and leisure, public and personal domains. Most people share an expectation that aging and leaving their main work life will bring them more discretionary time, even for those who do have to continue working because of economic pressures. In the Life After Leadership research responses, most of the leaders expressed a common passion for their social-purpose work. Yet there was also a longing for a different balance of life from what they have experienced in the past. Most talked about a willingness to carry new responsibilities, but these would have to come with fewer institutional burdens and more personal flexibility.

These comments by two leaders echo what we heard from many others:

“My goal is to help implement a national fundraiser [at the organization I led], and be a louder voice for homelessness in street youth through advocacy. I didn’t have time to do this as a CEO, when I was busy building/leading.”

“I would like to go back to the organization I worked for or to another organization as a volunteer staff attorney. I’d also like to have more time to travel, exercise and read more.”

The lack of shared vocabulary can make it difficult to name and recognize an experience for what it is. Although there is not an actual or singular checkpoint to define when leaders have moved into the “next” or encore stage of life, most say they begin to recognize it as they experience it. One person shared:

“Having spent 12 months on my own has been an amazing esteem booster, which is amazing because I thought my work as a senior leader in running nonprofits and managing public systems teams was the testament to my value. The difference now is that it has been my reputation and skills that are my true advantage and not the organizational reputation or the institutional network ...”

For those who believe they will know the “next stage” when they see it, here is an attempt to describe it more completely. Through the stories of respondents in this research and the work of Encore.org and others, there are some consistent characteristics:

What does encore work look like? How will you know when you find it?

- You are working to solve a social problem or serve unmet community needs.
- This work feels “different” from your mid-life career—you see it as a “next act” rather than a next step on your achievement ladder.
- The new “next act” is leveraging your professional and/or life experience.
- Your commitment is significant—the amount of time, expected duration, importance in your life.
- You are working in ways that meet your current life situation.
- If you have financial needs you are earning compensation that helps meet them.
- You feel satisfied and/or renewed by doing this.

Resource: *The Encore Career Handbook* by Marci Alboher

While there was variation among the words we heard respondents use about this stage of life, we will use the term “encore” throughout the remainder of this paper in order to simplify and normalize the language. As the long-term leader Suzanne Braun Levine, who exited Ms. Magazine after serving as its founding editor for 17 years, has explained: “You can’t really share experience if you can’t name the experience.”

The Emerging Patterns and Options for Encore Transitions

As members of the boomer generation move out of their formal leadership positions they will—by their sheer numbers—begin to systematize what now appears as a random adventure for those trying to find their futures. Most social sector leaders leaving or preparing to leave are determined to have a purposeful life—but many say they see only the edge of a cliff, rather than pathways and destinations beyond their current job.

In contrast, consider how plentiful the options seem to be in other stages in life. It is easy, for example, to envision the many possibilities at the end of high school for work or education, or post-college jobs and personal life choices. Mostly this is because so many people have already created these paths. Guidebooks abound, and there are entire industries devoted to helping young adults and their families make their choices. We can imagine the day when systemic and far-ranging options will be similarly clear for the decades after midlife. For now, those first in line are headed towards their encore by building the road while walking it; fortunately, they are quickly cutting trails for the rest of us so that new structures can emerge to serve those who follow.

As long-term leaders think about possible opportunities for their encore stage, they also can struggle to find strategic criteria to help weigh and value new dreams and ideas for the purposeful work they are seeking. Some people describe this process as the “opportunity sieve.” In other words, possibilities have to fit specific ideals, values and criteria for meaningful work in order to filter into actual choices. New ideas that seem perfect at quick glance are not really acceptable until they pass through the refining mesh of conditions represented by the sieve metaphor.

Some of the criteria that might drive decision-making for work that makes a contribution include:

- What problem, issue, cause or movement am I trying to serve or advance? Does this opportunity fit the strategic needs of that cause right now?
 - Where is the work located and does that suit my pace and place/living arrangements?
 - What is the time commitment—how much is needed and how much control will I have?
- Does this fulfill a dream I have for what I want to do during my lifetime?
 - Is this the right amount of power and/or the right position needed to fulfill the responsibilities?
 - Does this work and/or the position fit my strengths as a person?
 - Does it provide me with the resources (financial, emotional or others) that I need?

As dreams and ideas are sifted in response to these or other criteria, exiting leaders can move ahead to define more specific realities that lead to real-time opportunities.

Several of the criteria above address combining meaningful work with a more balanced life. The options for creating a pared-down work schedule after leaving a leadership position increase as more exiting leaders invent opportunities and multiply them for others. The idea is to find ways to find meaning and commitment while shaving down the backbreaking load of hours and worry carried by most social sector executives.

Consider each option in this table (and your criteria) as a way to begin lining up your own profile of good landing opportunities. Some of these are pathways to test a new type of role. Others can be the new way of working for many years. Imagine yourself in these situations and check your interest level as you go along. There is room to add your own ideas if you are blazing a different trail.

HAVING IT ALL—Options for Devising a Great Encore-Stage “Landing”

Description	little or no attraction	sounds interesting
Smaller venue. Shifting a leadership role from a larger to a smaller organization. The needs may still be intense, but everything is smaller than you are used to and therefore more manageable.		
Restructure the familiar. Negotiate with your organization for a different role and assignment.		
Place-based. Intensify personal time by moving to a leisure community or the place of your dreams		
Downsize time commitment via part-time work. Do whatever, wherever ... just do it part time.		
Short term gigs. Downsize pressure and long-term commitment by seeking limited engagements such as interim directorships.		
Consulting. Create an independent or partnered practice in any/ every service needed in the sector.		
Executive volunteering/service. This is systematized and facilitated: e.g., service corps experiences of various types are mostly project-based assignments that are stipend, salaried or volunteer interim placements in executive or specialized roles.		
Direct service/adventure. Shifting from managing others to doing the actual work. Can be in a staff position, as a volunteer or in a defined term as a service corps member, like AmeriCorps. Peace Corps, National Parks Service Corps and others are service opportunities that require unusual travel and/or adventurous living.		
Social entrepreneurship. Creating organizations or programs to organize resources for human and community needs; usually high risk.		
Learning opportunities. Service that emphasizes formal or informal education such as “senior” internships, returning to school, pursuing a fellowship.		
Teaching and mentoring. Investing in the next generation through formal teaching or informal tutoring and mentoring.		
Public service. Appointments (paid or unpaid commissions or boards), elected office.		
Social investment. Social business ventures.		
Other ideas?		

Which of these ideas appeal to you? How many do you like? Is there a pattern? A practical strategy is to keep track of these preferences and begin investigating the opportunities through online research, networking, visiting organizations offering the opportunities, etc.

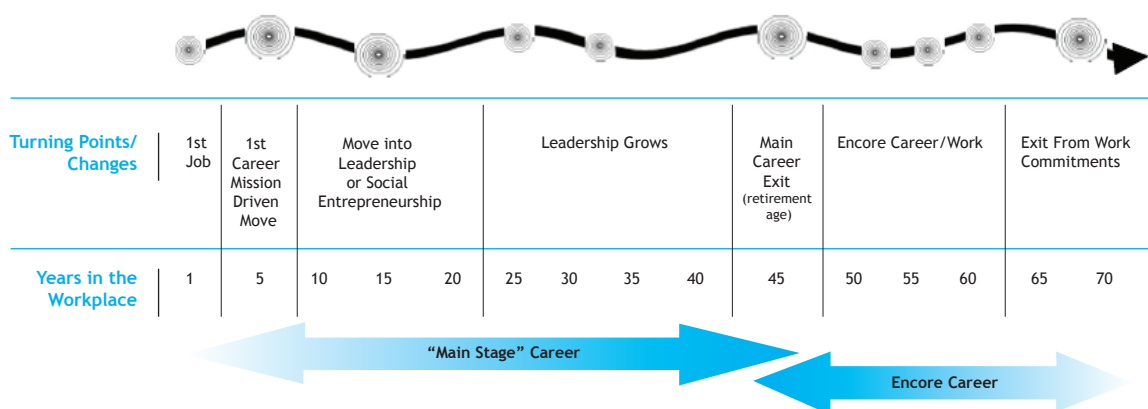
Summing up, it is always a surprise that from a distance (or through the rear view mirror) transitions look easy, flawless, as though the leaders knew their steps in advance and executed them with grace. Up close, the reality has much more depth: there are challenges, new opportunities, adventures, stumbling blocks and curve balls. By necessity, those in or near transition now will go after what's possible next in the midst of changing circumstances and opportunities.

Great Landings: 3 True Stories

Great landings shares the stories of three people shifting to their next (or second and sometimes third) acts beyond their main career in strong and intentional ways even if—and especially if—they had to conquer some problems along the way. Between the inspiration for an “encore stage” of life and what the “next stage” work options might be, these give a good idea of what it looks like when real people succeed in making a great transition and landing.

To put these leaders’ current choices in context, the diagram below shows a timeline for personal leadership that takes into account new options for the encore stage of life. The timeline shows a likely pattern of decisions at certain markers in the years of a career, but these are approximate and not precise or prescriptive.

LEADERSHIP TIMELINE: A Likely Pattern of Lifetime Milestones*



- “Routine” Transition - a job change or an adjustment to position or career focus
- Major Transition - a step-up in responsibility and commitment; a major life change

* This is a composite of patterns repeated by many interviewees. Some people have more turning points - job and life changes - others have fewer. Most follow a consistent vision of their own making regarding the cause they serve and how they serve it.

Although the brevity of these stories may make their transitions appear seamless, each person struggled through the dilemmas facing so many leaders right now—when to leave a major leadership position; how to leave; how to prepare their organization; what to go to; how to continue living with purpose and impact while also making room for more personal pursuits, especially family and/or personal skills and passions. None of their stories are straight-line, logical models. And yet each one is unfolding with passion and direction.

Freddie Webb Pettet—a Triple-Play Encore: a Job, a Passion, a Chance to Go Home

Freddie Webb Pettet's 40-year (plus) career has bloomed into an encore in three distinct stages. In those 40 years she kept her focus on equality and social justice without ever skipping a beat. Nourished all her life by strong family ties—church communities, her “Deltas” (college sorority), Urban League, Kellogg Foundation and its Fellows' Networks—these networks led her from one opportunity to the next.

Early on she moved up through Urban League leadership and then into state government to redesign Oregon's children and families agency. Selected as a Kellogg National Fellow, she later went to work for the Kellogg Foundation to help build the community leadership program.

A decade later the Foundation decided on a regional strategy including the mid-South as a high priority. In the back of her mind Freddie knew that at some point she would like to return to her roots in the mid-South (Louisiana, Mississippi, Arkansas). She said to herself: Why not now? So she applied and was hired as the mid-South director. She knew this was her first step towards an “encore” life even though she was accepting another full-time assignment. She bought a house in Arkansas to be the perfect base for her work and also eventually her “retirement” home.

After five years she “retired” from her Kellogg role just in time to be recruited to take a full-time but short-term position to help develop the Clinton School for Public Service at the University of Arkansas, Little Rock (Encore #1). After helping to develop the program, Freddie became a part-time faculty member for the School and an advisor to a local community foundation initiative on race-identified philanthropy (Encore #2). Now after several years of that pace, Freddie has settled into consulting and occasional teaching (Encore #3) with much more time allocated for personal pursuits, finally shifting the balance substantially from work and causes to a personal life.

Ruth Wooden—Destination in Sight; Landing in Progress

After decades serving as President of two major nonprofits—the Advertising Council (1987-1999) and Public Agenda (2003-2010)—Ruth Wooden was ready for her encore, but uncertain what shape it would take. In the early months after leaving Public Agenda, Ruth was consumed by caring for her mother, who died in March 2011. She then relished a quiet time to enjoy freedom and think about what, if anything, she wanted to do next.

An unexpected e-mail from a colleague planted the seed, leading Ruth to meet with the Union Theological Seminary's President who was looking for someone to teach a course on advancing public change. Ruth's first instinct was to say no. She really didn't want to teach a subject so closely connected to her previous work. But her ears perked up when she heard that the course would be offered only to students preparing to become ministers. Now, that—the idea of teaching future ministers—sounded interesting! She went online to learn more from the school's website and discovered that it offered a major called Psychology and Religion. “I thought, Wow, this is what I want to do—spiritual counseling,” she explained.

She had discovered something that matched her passion rather than her skill set. Long story short: Ruth applied to become a student, decided to teach the class on the side and is now on the way to earning her M.A. She plans to open a practice as a counselor for family-support programs, and also engage in advocacy for families struggling to support family members with mental illness and/or addiction issues. She has already begun working for changes to the privacy policies that get in the way of families helping their family members get access to the help they need. Her encore destination is in sight.

Paul Hill—Moving On ... As a Social Entrepreneur ... Again!

When Paul Hill retired after 33 years as the leader of one of the oldest and largest neighborhood organizations in Cleveland, he was proud of his work. He had transformed the organization with programs ranging from infant and child daycare, to afterschool programs, to senior programs. East End Neighborhood House integrated community needs and activities with social and culture-based services, and in the Settlement House tradition, it supported advocacy and community organizing. During his tenure, Paul provided an inviting space for all family members, and his staff and volunteers maintained the rich cultural heritage of the now predominately African-American neighborhood.

Paul especially liked working with young people, who he described as “refreshing and who always see the light at the end of the tunnel, and when you talk about change, young people always have been in the forefront of change.” And Paul knew he had a gift for serving families and bringing people together across generations.

It was this gift that led Paul to found the National Rites of Passage Institute, his new venture after leaving his position as Executive Director. Incubated while he was at East End Neighborhood House, The Institute’s mission is to promote African-centered Rites of Passage for child, youth and community development, helping young and old to come to know who they are and proceed from one season of life to the next—childhood, adolescence, adulthood and elder.

Paul never considered traditional retirement. Now 69, he is following in the tradition of his elders and ancestors: “That has been very important, the legacy of those who came before, and of my family in their contributions for the living and yet unborn. May the circle go unbroken.”

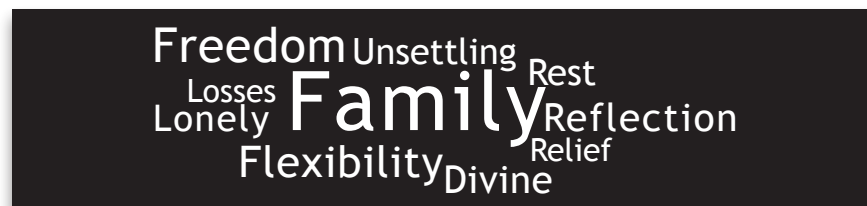
As these stories illustrate, each person will create his/her own unique “landing.” In *The Encore Career Handbook*, Marci Alboher astutely observes this process of people finding their way:

“... you are as likely to invent your encore work as you are to find it in an existing full-time job. Many of us have no desire ... fitting into the employee box after a certain age. Instead you may end up creating your own role through some combination of self-employment, entrepreneurship or even activism. In some ways, all encore roles have a do-it-yourself aspect.”

And some pages later she also reminds the encore-seeker:

“When you’re on the journey, expect some discoveries that take you in an entirely unexpected direction. That’s progress, too.”

PART 2: THIS LIFE TRANSITION IS AS EMOTIONAL AS IT IS RATIONAL



“To have the courage to say no to some things you have to have a bigger yes burning inside yourself.” –Stephen Covey

Emotional intelligence—the ability to self-manage and also handle or facilitate a group—has gained mainstream acceptance as one of the most valued capacities of effective leaders. Yet many organizations expect stoic, emotion-controlling behavior that does not get in the way of rational and business decisions. These mixed messages about the value of emotions and emotional intelligence in the workplace, and especially in the behavior of leaders, help to explain why it is difficult for leaders in an exit transition to deal forthrightly with the emotional cost of making this major life change. Part 2 pulls away the curtain and brings to light some of the emotional realities of the encore transition. It examines the fears of losing positional power, as well as the exhilaration of experiencing new freedoms, along with the worries that accompany the transition from planning to implementation.

The Fear of Losing Traditional POSITIONAL POWER ... and What Replaces It

Moving out of long-held positional leadership often involves the loss of the power that position bestows and may be needed to get things done. Most social sector leaders say they won't miss the “perks” of a leadership position, but they fear losing the ability to direct resources and guide things into action through the force of an entire organization.

But while some level of fear was universal, it lessened after settling into the next phase of life. It is the anticipation of change, rather than the reality of life on the “outside,” that caused anxiety, and most leaders found a place to “be” and a way to move from positional leadership and title to a different type of power. Most important, respondents said they settled into a new sense of identity about themselves beyond their institutional identity that was reassuring and rewarding. However, it was a process that evolved over time and began with higher anxieties at the beginning of the change process.

The most direct data dealing with this fear was about identity. Forty-two percent of the respondents admitted that they worried before leaving that their identity would suffer. But many gave up that worry after they had moved through transition (only 23% were still worried after they transitioned), indicating that their new lives are affirming their identities.

Although this indicator affirms that many leaders settle into a meaningful life and service to their causes without their CEO positions and titles, some continue an inner dialogue about position, place and prestige that is difficult to resolve. One survey respondent commented:

“I realized how much this long tenure [as CEO] had affected me. ... I have found it difficult to let go. I grew up with this organization; it grew from barely surviving to one that is flourishing. It (leaving) has been more of a struggle than I had anticipated. I am having trouble placing myself in the background.”

The adjustment can be particularly stark and challenging for leaders who choose to downshift into staff jobs where they have far less power. Even though she knew what it was like not to be an Executive Director and was excited to relinquish that role with a merger of her organization, one respondent discovered it was hard not to be in charge.

“As ED, I didn’t have to ask permission or forgiveness when I did something wrong. Now in a hierarchy where I’m not on top, it is more difficult than I had thought. In reality, moving from ED to a program position is much harder than I ever thought it would be.”

Some leaders anticipate that the work they do after exiting their long-term leadership position will be “lighter,” smaller, less significant and have less impact. That might be true for some, but it does not seem to be the norm for most social sector leaders who move into an encore career. Most describe their encore stage as some of the best and most meaningful work they have ever done. They often talk about never being happier. Some say that they are making as much of or more of a difference outside of their long-term leadership role than they made during the peak years of their careers. Two of the survey respondents put this perspective into their own words:

“It has brought a new meaning to what a purposeful life means. Being in charge or having status through a title or sitting at the peak of an organizational chart is not the only route to making a significant difference in solving social problems.”

“What surprised me most is that in my consulting practice I am making a difference in the lives of many more thousands of people through the diverse populations served by the organizations I help to grow and thrive ... Who knew that the encore career would actually reach more people and pay much more per hour!”

Like all good things, though, working purposefully and differently can be challenging—sometimes because of working alone or when others are in charge.

One leader expressed surprise about...

“the difficulty of reframing and understanding how I contribute to society. Now I no longer choose to be at the center of organizational leadership, I am unsure of how I contribute from the periphery. I feel grateful for my success as a consultant to nonprofits, but still wonder if I’m doing enough.”

Another reflected:

“It feels so different—I am no longer competing to be at the top. There is a different energy at 30 than at 60. I think I am a young 60 ... but I know I am 60 and I just feel different. I see young people doing amazing, creative things that I could never do now ... but I do bring something to them about understanding the structures in which they are trying to work. It feels so different. ... I am no longer competing to be at the top of the rock.”

While leaders moving into the next stage of life may feel cautious about how others perceive their position and value, they have few doubts about their own identity. People simply don’t lose identity in the way that they may have feared. They give up one position and/or identity but they replace it with something new and often something much better.

When asked what would be most important in a next stage of life (after leaving one's long-term career and leadership position), the respondents unanimously valued:

- Feeling like I am making a contribution to society (97%)
- Learning new things (95%)
- Applying my knowledge and experience (96%)

Facing the inevitable shift of the power structure in transition, some leaders moving into an encore discover deep truths about individuality and how to approach working with or without the title. One of the respondents reflected on the inevitability of her leadership tendencies:

“... whatever organization I belonged to I ended up as the chair and the president. In my retirement speech I said I don't see myself as ambitious or wanting to be a leader [now]. But I have some innate qualities that mean I'm always in a leadership position.”

Catching the EXHILARATION of a New Kind of Freedom

Transitioning leaders catch on fast that the shift into the encore stage is accompanied by a strong and pleasurable whiff of freedom! Most of those continuing to work have negotiated for less-than-full-time hours and substantial flexibility. The combination of flexible time and/or location, along with a release from the typically unrelenting executive responsibilities, increased time for simple pleasures, a bonus of hours that simply were not there before. In addition, leaders are freed from many of the binding protocols of CEO behavior. Though it can be hard to let go of being in charge, respondents identified advantages to leaving behind the position and the title, including:

- A sense of choice or discretion about time and availability to others
- Ease about building relationships, especially professionally and in the community
- Freedom of expression personally and politically
- Return to privacy/less fear of publicity

Several leaders described their reactions and the pleasure they found after letting go:

“I'm reading a good book and talking about it with friends. Learning something new. Now I'm fantasizing about landscaping my property. Seeing sunrises and sunsets for the first time in years. ... Seeing my grandchildren. These days I feel more alive than I have for quite a while. When I wake up I want to get out of bed. I had lots of good days in my job, but it was a lot of work!”

For another respondent, the difference was so stunning that six years later she can still vividly describe the lunch she had with a friend after she left her position, remembering the place in considerable detail—the museum, the exhibit—and the revelation that “Wow, people go out to lunch with friends on Wednesdays and have a great time.”

They also disclosed several dimensions of feeling liberated about relating to others once they left the constraints of their long-term leadership roles. When you are no longer the spokesperson for an organization, there is freedom to speak your mind:

“As ED, I was always ‘on.’ Image was important. Now I have more freedom.”

Several others expressed a common sentiment of being able to “say what I think instead of being the diplomat.” One leader described how as CEO she “was always sizing people up” to get the right people on the board, move them along in their interest/generosity/dedication to the organization. She said, “I like being able to enjoy people now without that.”

Many respondents expressed surprise about feeling “happy” after making their shift out of long-term leadership:

I’m surprised by ... “the ability to spend time doing what I REALLY WANT TO DO as opposed to all the other ‘duties as assigned’ that kept me chained to my position.”

I’m surprised by ... “how much more fulfilled I am by providing consulting services and having a wider impact on the nonprofit sector.”

I’m surprised ... “that I haven’t missed IT (the longtime job)!”

For many leaders the “exhilaration of freedom” is part of the transition. For almost everyone there are some moments, days and/or months that feel like “school is out.” These moments seem necessary to lift away from the longtime leaders a hyper-vigilant sense of responsibility (and ownership) for their organization and also to help propel them towards an acceptance of what is new. For most, the rosy sense of excitement does not define the complete experience, but it is an important part of the forward momentum.

Worries Are Real and Then They Disappear ... Almost

In addition to the fears about losing traditional power and despite the exhilaration of freedom already described, there is a wider set of worries about the future that defines the emotional experience as leaders exit from long-term leadership responsibilities. We learned from the respondents that not everyone worries a lot over everything. But almost everybody worries about something, whether it is prestige or leisure time or finances. We found, however, that leaders don’t worry forever! As time passes, these anxieties lessen as leaders begin replacing what they were doing “then” with new ideas and new possibilities. Leaders in transition begin to say no and goodbye to those old and once all-consuming responsibilities in order to focus on new and exciting opportunities. For most, the worries decrease substantially in nearly every category as transition into the next stage of life unfolds.

However, the space between before and after is intense. Moving into a new phase of life catches leaders at a complex moment. During the transition, they are in a maelstrom of change and rightfully are concerned about the truly important issues, along with being distracted by the “urgently unimportant” details of everyday life. It is a difficult time to discern and choose new opportunities.

Some may still be carrying and dealing with substantial stress caused by the exit transition from their longtime organizational role. Unsettled and/or anxious feelings invading everyday thoughts after a transition can result from a complicated and possibly hostile exit process that still needs appropriate resolution. In contrast, many leaders have positive memories of a fair and rewarding exit process yet still feel anxious due to concerns over finances, health and other quality of life/survival issues. Waking up in the days after leaving a longtime job can be challenging: Some may be preoccupied with an uneasy or melancholy feeling about what is next; for others, the feeling of joy is instantaneous. Positive or negative, easy or queasy, it is a volatile time and the emotions provoke a level of worry in anticipation of the transition.

In the words of one leader who felt uncertainty: “It is easy to think about the future as long as I can see myself as strong, vital and able to contribute.”

What do leaders worry about? Beyond the concern about position and power described earlier, leaders are concerned about security and well-being for themselves and their families. Most of these worries lessened “after” transition.

	Worried Before	Worried After
Financial security	63.4%	54.8%
Healthcare/Insurance	63.4%	41.9%
Creating enough leisure time	43.1%	25.8%

“I was more worried about financial security before I left ... It is not as scary as it was at first!”

One person ended an otherwise positive reflection on her transition with this caveat:

“I’m also nervous about having enough retirement funds to support my family in the last third of my life. What is enough?”

Another set of concerns is focused on the novelty of the free and unstructured time that is likely to be available in the new stage of life, especially before new commitments are fully made:

	Worried Before	Worried After
Being Isolated	34.8%	24.2%
Finding ways to contribute	49.3%	40.3%
Not having enough to do	22.3%	11.5%
Staying Relevant	50%	42.6%
Not knowing what to do next	28.1%	17.7%

Getting to the “other side” and losing their worries about time and idleness produced both giddiness and “reality checks.”

One person who went from being a CEO of a major organization to a solo consultant said,

“It is lonely out here. How do I print an envelope on my printer? My husband is my new assistant!”

But another gushed,

“I was surprised by how delightful it would be to sleep in if you wanted to; the freedom and flexibility in your daily schedule to do the things you wanted to do; that was just delicious. I hadn’t had time [before] to think through how delicious that would be.”

Despite this evidence of less worrying after settling into new life stages, there were three areas of worry that actually increased after transition: Where financial security is uncertain, finding necessary paid work continues to be a concern. The same is true for those deep and complicated personal feelings about being needed and valued that create an undercurrent in some transitions.

	Worried Before	Worried After
Finding another position that pays enough	31.5%	33.9%
Having prestige/receiving recognition	14.8%	16.1%
Taking care of family/ others	32.9%	45.2%

For most leaders, though, the best way through is to acknowledge the worries and find ways to deal with them.

“I did a legacy statement as part of the succession planning and all the board and staff responded to it ... It was about being passionate, caring about others, being a good steward. It was affirming to have others recognize [my] accomplishments ...”

“I am physically healthy and strong, continuing to learn and develop, and am blessed with many talents. The future is exciting. And so is the present!”

“When I am making decisions and in alignment with my values I’m joyful. As long as I’m doing that I’m on the right track.”

Being human means that we may always have something about which we worry. As we have shared the findings from this research with others, a frequent response is relief when told about the patterns of diminishing worry associated with the transition to the encore stage of work. And many told us that this resonates with their own experiences as they move on to new adventures. As one person put it,

“I believe there is some spirit inside of me that directs me that opens the doors that I would not normally have access to, and I am trusting in that spirit.”

Some Poignancy Lingers ... That’s Life

Not everyone makes a smooth transition. And many leaders carry with them a poignant sense of loss or disappointment about the transition as they also gather their energy to move on.

Our research revealed several different circumstances that can lead to a more complex or difficult transition. Some broad descriptors that cover a number of nuanced situations include:

- The executive exit is part of a broader failing or unwelcome change within the organization (e.g., financial difficulties, mission overtaken by others, etc.).
- The leader’s exit coincides with intense personal/family issues (personal illness, or illness and other needs of parents, children, spouses/ partners/friends).
- The exit was forced—not the leader’s choice and/or the exit did not go well even if it was the chosen action (e.g., the exiting leader gets “blamed” or key relationships disintegrate).
- The exit prompts a deep personal review that reveals too many unfinished goals or disappointments—personal or professional.

These narratives about personal and professional disappointment and pain can complicate transitions and make a next-stage shift more difficult to achieve. Very few of the exiting leaders expressed feelings of regret about how hard they worked for their organizations or how much they got done. Most of them felt that they had “given it all” to the organizations they served. A few regretted not succeeding at accomplishing some greater social or policy goals (e.g., not passing the Dream Act; not ending patriarchy). But disappointments about their work were more about the organizational development goals that were not fully achieved, such as organizations not being fully sustainable; inadvertent bad timing on the CEO transition; failure to strengthen the board enough for the transition.

For others, the sense of loss came after leaving and was much more personal and often unexpected.

Two people expressed this:

“I hadn’t realized the depth of feeling from my staff and it touched me.”

“It surprises me how much I miss it. As much as leaving was my decision, I was in control of the timing ... I miss going in and seeing the staff being in a busy office. It is lonely out here.”

Some leaders feel unrecognized for the huge portions of their lives they gave to their organization. This can come out in subtle but hurtful ways; for example, feeling erased when past leaders are not recognized or mentioned by name in publications and on websites that recap organizational history.

One leader who generally had a positive transition was still taken off-guard, recounting:

“I have gone down to visit with my successor and there is an intern at the desk who doesn’t know me ... The lack of identity is hard to take, [as is] the loss of people.”

Another assumed that the board would want her advice and counsel at least for a while after the exit, but board members never call. Most respondents, in fact, said they were sought out far less than they expected, and they were surprised and hurt that they were not needed ... even a little. Some came to understand that they either were really NOT needed or the staff/board could find no comfortable way to seek out their help.

And sometimes leaders are just struggling to cope with the random luck of the timing of life’s changes and curveballs:

A few people shared these reflections:

“I have no retirement funding and my husband is in ill health; money is a top priority that will color everything else. My concern is my health may not hold up as long as I need it to for me to keep a home and function like I want.”

“By the time I left my organization I had been burning out for at least three years, but was trying to find ways to renew myself, including taking a sabbatical.

The physical and psychological exhaustion of burnout and the great responsibility I felt to ensure the organization was in good condition completely filled my consciousness. That left little room to think creatively about my future.”

“It is difficult thinking about how to balance responsibilities associated with care for my elderly parents; possibilities of health-related challenges that could be facing my spouse, children and grandchildren spread out all across the United States; and balancing all this with my own personal desires and aspirations.”

It is not surprising that those hitting an end-of-leadership-position moment that is perceived as disappointing or difficult experienced poignant or negative emotions. And these emotions pressured the leader to find the presence to overcome doubt, disappointments or difficulties in addition to mustering the energy to move forward.

For most, the ultimate lesson was that poignancy, regret and sadness can all co-exist with optimism and moving forward, and few leaders reported stopping completely before moving on.

PART 3: WHAT'S YOUR PLAN FOR A GREAT LANDING?

Financial planning

Negotiation Transition meetings
Succession plan Discussion

“It takes as much energy to wish as it does to plan.” –Eleanor Roosevelt

Most of the respondents in the Life After Leadership research—regardless of their own personal preferences and styles—agreed that planning for the next opportunity is a good idea. Those who didn't plan wished they had, and those who had planned said they were glad. They were unanimous in recognizing the value of some form or style of preparing for what comes next.

While managing the many churning emotions, as described in Part 2, long-term leaders also are handling all the practical steps of moving into their encore stage of life. This active and practical process of making a move requires strategic and rational planning along with quick and cultivated intuition to recognize opportunities. Both reflective processes and pathways for decision-making are needed to go forward.

Part 3—What's Your Plan for a Great Landing? examines how good transitions benefit from strategy and planning even though these plans inevitably move along simultaneously with turbulent personal emotional undercurrents and in the midst of unpredictable external realities and opportunities. One leader disclosed:

“I am a strategic planner by trade so this is easy and fun as an exercise, but fears about finances and healthcare coverage tend to cause some confusion emotionally.”

Leaders bring core skills and methods into their encore transition from their own executive experience. Those skills and the broader strategy knowledge from years of leadership can be adapted to the needs of this life transition, knowing the planning process will not always be tidy or sequential. Some people prefer to step away from everyday life to do the planning, while for others it happens best alongside and in the midst of other everyday life commitments. The following four sections explore how and why to integrate planning skills and ideas into your own transition process.

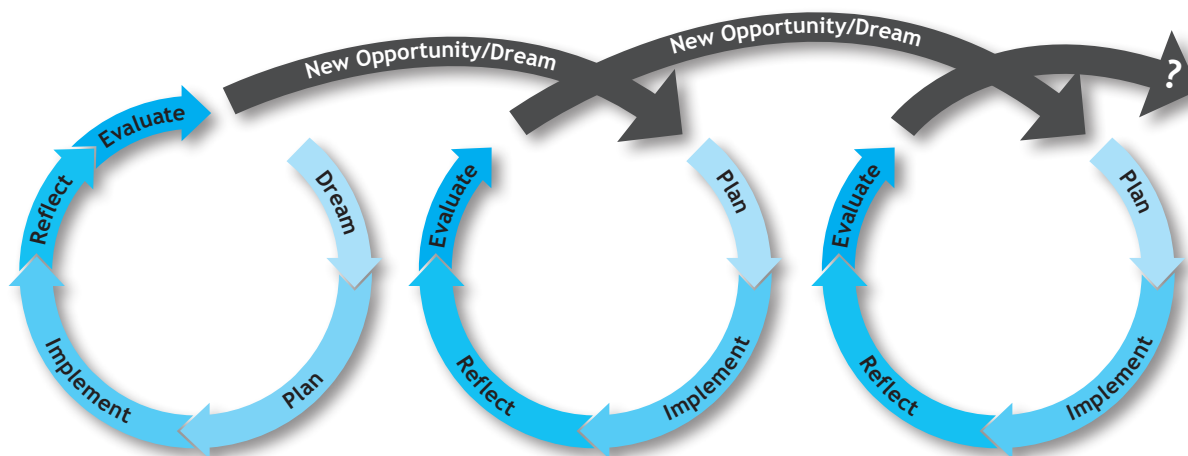
First, ADAPT PLANNING From a Familiar Professional Skill to Personal Use

Fortunately, most social sector leaders have well-developed strategic planning skills refined through years of guiding their organizations through change and innovation, crises and opportunities. In a 30-year career—and especially among founders—an exiting CEO has led dozens of strategic planning, reflection and/or change management sessions! For many leaders, life transitions have been intertwined with or run parallel to their organization, and so planning for one has done double-duty for the other. But as leaders prepare to leave, they realize their personal issues are diverging from the organization. It is time to translate those strategy skills from the organizational to the personal domain.

Learning how to approach this stage of life as a planning challenge is especially important since many will seek multiple opportunities and transitions following their main-stage leadership career. Even if the first encore opportunity is already decided (sometimes before the exit transition even begins), leaders are likely

to transition again in four to five years and possibly again and again. Knowing how to plan personally will be an ongoing challenge even—or especially—in this stage of life. Planning is circular or spiral in nature and it goes on and on, rather than having a fixed beginning and an end.

LIFE CYCLES IN ENCORE YEARS: A Time of Agile and Fluid Change



Planning can morph into many other methods and disciplines (scenario planning, strategic conversations, change management, innovation development, etc.), but the principles of planning are basic.

Principles of Planning

Dream

- Understand the current situation internally and externally
- Learn what's new
- Imagine a desired future (and/or possible futures)

Plan

- Decide on goals and strategies

Implement

- Design action plans, implement, and redesign action plans as needed

Reflect/Evaluate

- Take stock of how it's working; observe and learn

New Opportunity/New Dream

- Adjust/adapt and make whatever additional changes are needed/desired
- Imagine the next new thing (i.e., "Rinse and Repeat")

As leaders leave their long-term roles they are stepping into a change cycle no matter what they do; planning will assist in making their next steps part of a more deliberate cycle of development. Regardless of the planning method being adapted from professional to personal, and no matter what stage of change a leader may be in, the important thing is to build on personal skills and commit to the learning and mindfulness or focus that planning will require.

Understand the Value of a STRATEGIC PAUSE ...

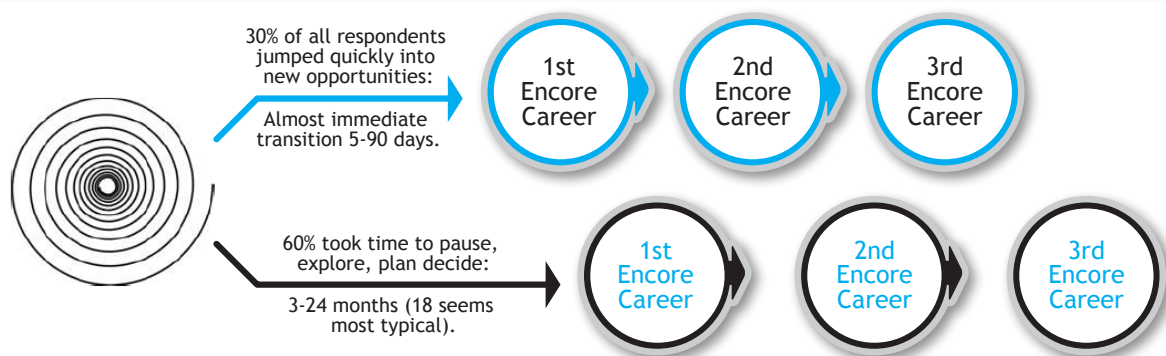
Most leaders appreciate that a strategic planning process often starts by slowing down to think. Planning is structured to allow an organization to pause, reflect and learn in order to adjust or change a course of action. There are numerous tools that experts and facilitators bring to organizations to help do that. In the same way that organizational boards engage in “reflection” or “retreats” to open new conversations and new thinking, individuals can also help themselves to some level of reflection in order to make momentous personal decisions. For many people, that reflection comes with a deliberate pause ... some time—days, weeks, months or longer—to decide how to step into a new stage of life. Leaders who come to appreciate the value of planning often negotiate their exit package to include some support for their transition—an interim block of time (a deferred sabbatical, payout of leftover vacation days, a recognition bonus, etc.)—to offer some space to think about the transition. “Buying” some time buffers the transition and helps support the planning.

This “pause” as part of a decision-making strategy can have enormous benefits. Kevin Cashman in his book *The Pause Principle* writes:

“Pause, the natural capability to step back in order to move forward with greater clarity, momentum, and impact, holds the creative power to reframe and refresh how we see ourselves and our relationships, our challenges, our capacities, our organizations and missions within a larger context. ... Pause, like sleep, is a natural transformative process that cannot be ignored if we want to operate at peak levels of performance.”

Many people choose to start their transition with deliberate planning activities that include that pause. In honesty, though, there is often great tension between the competing urges of planning/doing vs. pausing/reflecting/planning. This diagram shows the two pathways; most Life After Leadership respondents chose a pausing/reflecting approach.

A Close Up of the Main Career Exit (“Retirement”) Moment



One respondent in the Life After Leadership interviews described the tension and ultimately the benefits of pausing:

“... one friend said I should have a plan and she was right. I should have firmed up my plans better... but I wanted to wait and see if something came up that I hadn’t thought about. I wanted to learn tai chi and I did, and I do it and I love it.”

Another explained:

“I relocated back to my hometown, 100 miles away, and needed to review work options in that area.”

While some leaders exiting their careers are considering the “pause principle” and the flexible self-made opportunities it represents, others are inspired to go even further by taking a “gap” or “bridge” year. This gap or bridge year is familiar to high school and college students who take a break from school for an adventure or service in order to rethink what to do next. Now, according to a recent Wall Street Journal article “The Case for Midlife ‘Gap’ Year” in December, 2013, baby boomers have discovered this concept as a way of preparing for their next stage of life. Such “gap” years can be taken at the very end of a career as part of the exit process or a bit earlier as part of an early planning process. For many, their stated goals are to “relax, re-energize and reflect upon what they want to do next.” For others it can be a more explicit preparation for what is next.

According to WSJ author Anne Tergesen,

“Some use this gap time to return to school, apply for fellowships, join peer networks to help find a new direction. Others volunteer, travel or take on a big project such as writing a book. Sometimes they may do very little. However they spend the time they often find that taking a break brings a fresh perspective on their plans and prospects—sometimes taking them in directions they never expected.”

One person Tergesen followed, Stephen Ristau, had been a chief executive of a nonprofit in Connecticut. He and his wife (an Aetna Insurance manager) traded in their Connecticut life for a gap year in Mount Hood National Forest (Oregon), and both emerged with new careers, less money and much-less-pressured lifestyles. Mr. Ristau said he worked from a personal mission statement that he first started to develop in his 40s; Ms. Ristau reported taking a more intuitive approach though she was clear that she did not want to return to the pressure-filled work she had left behind.

Some leaders who have actually moved into their “next” life described different amounts of time spent in the “atrium”—an architectural term used as a metaphor by anthropologist Mary Catherine Bateson to describe the transition to a second stage of healthy, energetic, mature adulthood. Rather than adding a new room in the back, she imagines it added in the center of the house with doorways to all the other rooms and open to the sky, “filled with fresh air and sunlight ... presenting an opportunity for reflection on all the rooms that open off of it.” There are many things you can do while you are in this new atrium space, and you can hang out there as long as this feels right!

Many people interviewed questioned “how long” a transition should take. The time frames are unpredictable and vary from person to person. Consider this person’s description of how long it has taken to re-energize and move forward:

“I was surprised at myself that I didn’t know what to do next ... didn’t have a clue. But people allowed me to find my way. Others helped me because they wanted something from me and they were willing to negotiate to get my skills while allowing me to get some of what I wanted in terms of flexibility and role limitations. I was tired ... and I didn’t even know how tired I was. It has taken three years and more to re-energize.”

Others described taking a month as a pause. Several had the benefit of a year.

Some respondents admitted that they needed whatever amount of pause time they could get to simply rest after completing their hectic jobs. Some described a near-obsession with cleaning closets, purging old papers and refreshing their personal space. Others said they wanted to pause but were offered opportunities that they thought they could not pass up, so they quickly moved from their long-term CEO positions to another responsible role, though usually not as fully consuming as their previous role.

Getting Planning Help Can Boost Your Transition

How each person gets to “next” will be as varied as his or her personal preferences for how to think, learn, make decisions and accept change. Some will be meticulous planners, some will wait to respond to opportunity, some will ease in, while others plunge quickly and intuitively toward the next appealing idea. Inherently there is no right or wrong way to chart a course for change. The Life After Leadership respondents indicate that most people depend on informal planning—their own documentation and the counsel of friends, family, and colleagues. Three out of five people said they had done some type of planning, and of those who planned, 88% felt that doing so made thinking about their own future easier.

There seems to be a cluster of actions that ease the transition process for many leaders. The findings show the benefits in the transitions of those leaders who:

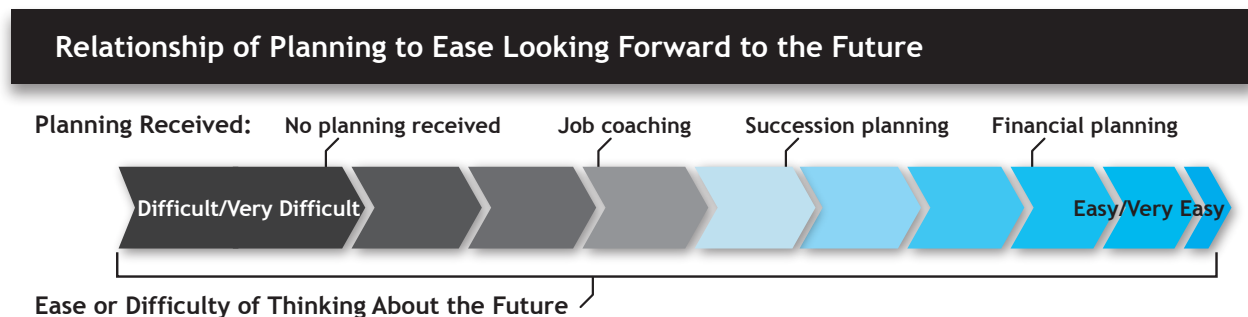
- Took care of succession planning in the organization they left and/or;
- Got some financial planning (from any reasonable source) and/or;
- Made some effort in getting general planning assistance.

Unfortunately, most leaders did not receive any formal options for accomplishing these plans, including financial planning. However, financial planning of some sort was the most common and well used when offered. Forty percent of respondents said they had done some sort of financial planning. Fewer than half the respondents had done succession planning with their organizations.

Forty percent of respondents reported they received coaching assistance, but indicated that coaching was less beneficial compared to other assistance such as succession or financial planning. However, anecdotally, those who received coaching expressed enthusiasm and talked about its usefulness. One leader who worked with a coach said,

“I was surprised how much I benefited from and appreciated the transition coaching and related counsel I received; it really helped me focus on the richness of this moment in my life/career and to be thoughtful and intentional in considering future options. ... What a gift this would be to so many nonprofit leaders!”

The following diagram portrays the relationship between the various planning services identified in the research and the extent to which they made it easier to think about the future.



One survey respondent summed it up this way:

“I am very deliberate about the future. I journal, seek outside coaching, talk with our financial advisor regularly. The financial peace of mind has been critical to my decision to go back into consulting after many years of CEO and senior-management roles. If I did not have that important understanding of where my family is on building our nest egg for retirement I would not have taken the risk that is inherent in consulting.”

Others reflected,

“This has been an extremely deliberate process in which I drew upon multiple resources, including an executive coach, dear friends, colleagues and family. I am feeling very good about my decision both for me and the organization ...”

“I am very good at visioning and strategy, even when it comes to my own career ... So much harder for me is making it actionable, hence the attraction to coaching and information ... then support.”

Most Life After Leadership respondents did not see formal transition planning services as readily available. A few employers offered services like executive coaching, and others offered minimal or narrow financial counseling to the leaders as part of making decisions about retirement savings. Many said they would have taken advantage of financial counseling had it been available.

The lack of formal services was compensated by self-help. Some respondents found their greatest support and learning came from long-term peer groups. One women’s group met regularly (weekly) for 28 years and its members counseled each other through many life changes. Others had similar experiences in professional and/or personal peer groups they had participated in for 10 or more years, sharing personal and professional life transitions.

“My women’s group is an amazing group of women in all sectors. Initially we wanted to support each other to get ahead in our careers, but we ended up supporting each other through our entire careers and into retirements.”

Learn the Value of a Mission Statement ... Anytime, Anywhere

Leaders who are exiting their long-held leadership positions say—without ambiguity—that they are ready for something new.

Over 65% of the Life After Leadership respondents said that they believe the exit

“... is the beginning of a new chapter in my life in which I can be active and involved, start new activities, and use my skills and experience to help others in a paid or volunteer position.”

It is not surprising then that so many of them think that planning is a good idea. Most of the interviewees told us they have a life mission statement framed in their thoughts. But only a few had taken steps to write that statement down and keep it fresh as life needs changed. Those who had felt that their mission statement guided their planning and decision-making. Their statements included passionate and direct language about what they wanted to do, their values, and who or what they are dedicated to. Many used the language of justice and equality. Many used spiritual language and voiced commitments to family and personal relationships. For most leaders the mission language integrates a code of ethics.

If you decide to try a mission statement:

A “Mission” is an inspired way of expressing a core purpose. A life mission statement captures a vision of what a person hopes their life signifies and the purpose they want to fulfill. Some of the most important questions to ask in creating a personal mission statement include:

1. Who am I/What are my personal gifts? (Where are my talents? Passion? Access? Knowledge? Priorities?)
 2. What actions engage and excite me? (Direct front-line adventure? Behind the scenes? Rescue? Prevent? Help one? Help all? Launch? Lead? Make? Love? Nurture? etc.)
 3. Why? What values motivate and inspire me? (Justice, equality, freedom, dignity, rights, participation, etc.)
 4. For whom, with whom or for what cause am I most passionate? (Women? Children? The poor? The sick? The innovators? Science? Environment? Justice? Arts?)
 5. At what scale do I want to make a difference? (In my family, in my own backyard/community, in my country, in the world?)
- *Reflect on each question here and write your thoughts. A journal is a good idea. Try ranking the questions in priority order with 1 as most important to you.*

- *Create a composite statement*

- *Edit the composite into a more artistic and inspired mission statement*

Here’s an example of a clearly worded mission statement:

I want to leave the world a better place because of my actions. I will love my family and friends and I will build organizations that stand for equality and justice now and for generations after me.

-Anonymous (Clohesy Consulting)

Here’s an example of a more humorous style:

I want to be the kind of person my dog already thinks I am!

-Anonymous (Franklin Covey.com)

Don’t be afraid to use your own style and flair to express your life mission!

A mission statement is the heart of a plan, the “software” not “hardware.” It is not a brittle, permanent or domineering document. It is not a trap. Instead it is an opportunity to express purpose, direction and core principles that, in turn, inspire ambition, guide good strategy and enable good decision-making. For some people a mission statement may “last a lifetime,” but planning advisors urge thinking of it as a living guide and allow for adaptation rather than simply ruling ideas “in” or “out.”

Ideally, a mission statement is conceptualized early in a planning or change process, but it can be done at any time and/or changed at any time when ideas and direction need to be clarified. Regardless of timing, creating a life mission statement or refreshing an old one is an important priority for leaders near the exit or in the midst of the transition into the encore stage of life, especially for those who wish to adapt other planning practices for their personal use.

For more ideas about life mission statements, consider these offered by the Life After Leadership respondents:

“My obligation is to use my blessings (family, education) to help people.”

“My dedication to social justice is in my DNA and it is what I live for, and even if I ever reach the point when I don’t have to work for money, it is still what I will do.”

“My life and what I do personally, politically and in paid work and volunteering is all about working in social justice. I would consider my life meaningless without working in the social justice context. This has to be in the forefront. And also to highly value friendships and family ... be really present in friendship and with love.”

“I have all kinds of journals in which I explore mission ... but I don't have just one written down ... but the guiding force for all of my thoughts on this ... my belief in God and his presence in my life; my commitment to children and those least served; and my belief that I have a set of God-given talents that can make a difference. If I follow that combination and can do the work ... then good things follow.”

In closing, remember that writing a personal mission statement is not quick work! It requires some deep thinking, questioning some everyday assumptions and making way for some new language to define your next stage of life. It is a task that needs to be started and then refined over time. It is a perfect exercise to begin as a companion to a transition process.

PART 4: SUMMING UP—NAVIGATING YOUR WAY INTO NEW ROLES WITH FEW RULES

Looking back over all that the respondents shared, it is clear that the encore transition is both a well-formed decision and an act of faith when a leader leaps out of the familiar life of the past 30 or 40 years and into something new. Transitioning leaders perceived their own transition experiences as alternating between coherent rational planning and highly intuitive calculations about opportunities, balanced between clear-eyed analysis and raw emotional worry over their organization or themselves and their family. Often they harbored the fear that they might be the only ones feeling the contradictions. The Life After Leadership stories and data confirm that shuttling back and forth between planning and intuitive leaping is all part of the process, but those who had successfully transitioned into happy landings agreed that planning somehow strengthened intuitive insights and decision-making.

As leaders accustomed to reaching out for organizational resources to accelerate past challenges, many sought out and adapted a wide variety of activities to help imagine their encore stage and to plan their next steps. Some reported using life transition courses, life coaching, leadership training, writing courses and personal-development training. Many also realized that they could, or should, be adapting what they know about strategy, planning and design in order to construct the best “life after leadership.” But most characterized the real-time experience as having a do-it-yourself quality without much guidance and lacking in tools or systems. And, they expressed interest in the availability of six areas of formal resources. Very few reported using these resources:

Service/Resource	Likely to Use if Available/Offered	Actually Used
Financial planning services	66.1%	17.8%
Peer support group	53.9%	3.1%
Coaching to decide next steps	62.6%	7.4%
Information about fellowships or sabbaticals	63.9%	4.8%
Information about consulting/part-time work opportunities	85.6%	4.4%
Information about how to be (re)involved in advocacy/activism	61.3%	3.0%

The disparities between interest and use indicate a gap waiting to be filled. In turn, this is an opportunity for human development providers and entrepreneurs to create informational and other resources that can guide self-discovery and manage the match of talent moving out of positional leadership and into new roles.

There is not yet a fully developed sense of a whole generation of leaders making this shift together. It still feels to most people like it is a singular experience. But for now, those leading the current generation of transitions are starting to pave the way. In response to being asked to think about what sort of support programs helped or would help other leaders think about their future and live with purpose beyond position, an appealing set of ideas emerged—in effect, an eight-point advisory:

1. **It's helpful to have financial planning ... early too**
2. **Everybody should have a coach ... throughout their careers, for all transitions**
3. **Develop a peer support network**
4. **Gain information/content knowledge about individual change**
5. **Learn skills in individual change management**
6. **Get practical tools—grids, templates**
7. **Build the muscle of compassion for ourselves. And leave time for ourselves.**
8. **Understand what this process is and how to go through it, how to not run from it**

In conclusion, the evidence shows that inevitably, a whole generation, with years to give/live, is headed out of current positional leadership and into new roles that are not limited by the rules, protocols or limited choices that are familiar in most other life stage transitions. At the same time, these transitions are not smoothed by easy availability of resources and services. Moreover, the potential availability of so many leaders for encore work can and should be a great boon to the social sector, but the sector is barely ready for the dimensions of the shifts that are coming. This article—**New Roles, Few Rules**—has emphasized the journey of the individual leaders while highlighting the implications for the sector and its systems. The space is wide open for innovation and creativity in the institutions, systems and services of the sector. Anything that can be created quickly soon will assist the boomer transition as it unfolds. But lifespan realities indicate that contemporary innovations will have value for future generations as well.

A fourth paper is scheduled in this Life After Leadership research series, and it will focus on the systemic implications for the social sector and how we can optimize the positive impact of the generational transfers of talent from one set of roles to the next.

ADDENDUM: 5 FORKS TO GO ... YOUR PERSONAL PLANNING AND REFLECTION TOOL

Getting “There”—Use Every Strategic Skill You Possess

SO ... Back to the Question of How to Get There

Making the leap into the encore stage of life—for most people—will be the accumulation of a cluster of smaller choices. They likely will not be made in a particular order—and the order for you will depend on your own circumstances.

The following five “fork in the road” figures portray several of the interconnected decisions you likely will be making—based on the most frequently mentioned choice questions revealed in our research. When faced with a “fork in the road,” you will need to choose one way or the other ... this or that ... this NOT that! Though there is always the third-way option—to blaze a new trail.

These five “forks” are intended as worksheets for anyone pausing to think about personal options. But if you are in a hurry or simply prefer some guidance toward a more intuitive choice, they can also be useful by simply reading the text rather than taking the time to go more deeply into the decision-making process by working through each fork and answering the questions and prompts.

And remember, this is an aid not a shortcut: Once you have all the “answers” you still have to make the decision!

More guidance on this information and on other planning exercises can be obtained by contacting www.clohesyconsulting.com. In addition, guidance for transitioning to an encore career can be found in *The Encore Career Handbook* by Marci Alboher.

Fork #1. Rest or Ready?

One of the first and most fundamental personal realities will be understanding (and admitting) whether you need to pause more than a few days for rest/reflection to understand your options and get your “house in order” OR if you are motivated or need to move quickly or seamlessly into a new role. Deciding whether to pause and think or quickly move forward into planning and doing is a first determinant of what lies ahead.

To make this decision, take a look at Fork #1 and consider the different paths. Think through and/or write down answers to the questions raised by the choices. When you make a decision, use it as a building block for other choices in the transition process. If you are undecided, go forward to the other “forks” and stages of planning; they may help you to get clarity on this first and fundamental choice.

FORK #1: REST OR READY

Do you need to pause for rest and reflection or learning? Or are you ready to move as quickly as possible into a new commitment

Option #1 Rest and Reflect

Take the time you need to rest, reflect and learn. Most of those exiting express surprise at how exhausted they are. This option is an intentional choice to move slowly and incorporate some deep personal learning that will fuel the planning process for what’s next



If I choose a Rest/Reflect phase what am I likely to gain? What are my goals? Any downsides? What is my timeline - when do I want to plan and be ready for the next step?

- 1 Intuitively, which of these is most appealing?**
- 2 What assets would support your choice?**
- 3 What obstacles or barriers could undermine your choice?**

Option #2 Ready! Plan and Do

Move quickly into an action planning and doing using a strategic process. Exception: If your exit was prompted by a new opportunity you may be super-ready and can move into the new commitment without significant transition time.



If I choose “Ready” am I skipping over an important opportunity for rest and reflection? How can I optimize the learning value of choosing a quicker path to planning and doing?

Fork #2. Choosing Realistically About Money

Each personal financial situation is another fundamental reality that needs to be dealt with forthrightly. The interviews and survey reveal that there are many social sector leaders who built and grew their organizations with policies that cover not only living wages and competitive wage scales but also benefits such as healthcare insurance and pensions or retirement savings accounts. At the same time others—especially community organizers and other movement-builders—often worked in short-term jobs for unincorporated projects or struggling institutions that paid few if any benefits. This, along with a lifetime of personal choices about money, has resulted in “haves” and “have-nots” as leaders face their exit. Some didn’t save but were “lucky” and received a windfall from family or an organization (former or most recent employer). Others made little but saved a lot. Some made a lot but saved little. Some used social justice arguments to build budgets with benefits in their own organizations, while others bent budgets always in favor of social action rather than the workers and leaders. The circumstances and realities are so diverse that each social sector leader is likely to get to the “retirement” threshold with a unique financial outlook. Therefore, it is one of the most fundamental issues in thinking about “what next”: to resolve how financial need (or no financial need) will play out in making strategic choices.

Use the money fork to try to understand your own real situation.

FORK #2: THE MONEY

How much money do I need to earn?

- 1 Intuitively, which of these is most appealing?**
- 2 Which is most realistic?**
- 3 What goals should I set for myself?**
- 4 What qualities does an opportunity have to have for me to choose to commit to it?**

Option #1

I need to remain in a competitive wage situation. I need to fully or almost replace my previous earnings or I at least need a steady and reliable income even if it is somewhat less.



TIME IMPLICATIONS: This option will come with a serious time commitment. The desired steadiness in the income will be linked to the steadiness or reliability of the work flow. Even where schedule flexibility can be part of the package the commitment will likely be substantial and ongoing.

Option #2

Making some money sometimes would be helpful and enjoyable.



TIME IMPLICATIONS: Earning sometimes and not others opens up many flexible options.

Option #3

I don't need to earn any more. I can afford to give my time.



TIME IMPLICATIONS: My time is my own. If and when I decide to commit my time it is for the potential impact or pleasure of the experience and/or the good cause.

Fork #3. Geography

Geography is one external issue that often has a life of its own. “Retirement” may be conflated with a long-held or new dream about the ideal place where the next stage of life can or should unfold. Sometimes the choice about geography is driven by family needs or the desire to be nearer to parents, children, grandchildren.

FORK #3: GEOGRAPHY

Where do I want or need to be?

- 1 What is dominating my decision about geography – spouse, family, work, lifestyle, meaningful opportunities?**
- 2 How can I afford what I want?**
- 3 Are there phases to my geographic decision in the next 3-5 years? If so what are they?**

Option #1 - Stay Put

My community is important to me. My friends and/or family are here. I want to stay rooted and involved in my home community.



IMPLICATIONS: Depending on the size of your community you will need to manage their expectations of you and your available time. Opportunities for volunteering, assisting family, serving on boards will likely outpace your available time. It is important to set priorities.

Option #2 - Mix It Up

Keep a familiar home base - your home community or a vacation community - and set some goals for travel and adventure. Some people choose to commute between two communities to satisfy lifestyle or family demands/desires.



IMPLICATIONS: Plan ahead for a meaningful life in your primary community. A mobile lifestyle makes it more difficult to generate steady income unless your work is portable.

Option #3 - Start Anew

A vacation home or a new community or different lifestyle holds the promise of a dream future...the opportunity to reinvent yourself... to explore things previously unavailable.



IMPLICATIONS: Plan for the financial and emotional cost of relocations. Refresh your network of contacts or friends in the new location and decide how available you want to be. Create a pathway toward new work through volunteering, not working, and sustaining friendships.

Fork #4. Do I want full-time commitment(s)? Or do I want partial-time commitment(s)?

FORK #4: TIME COMMITMENT TO WORK

How much work time works for me?

- 1 What life priorities are you trying to balance with work?**
- 2 How important is the money? (Fork #2)**
- 3 How open or anchored do you want or need your time to be?**

Option #1 - Full Time- Why Not?

I just don't feel finished with my life mission...I want to continue working full-time but don't necessarily need to be in the top leadership role. And/or I need the money. The only way to make what I need is to work full-time.



IMPLICATIONS: Some leaders are energized by a full commitment and "downsize" by accepting less responsibility. Others - motivated financially - need to be attentive to the qualities of the work and seek an opportunity that connects to deep values.

Option #2 - No Work

I've fulfilled one too many deadlines. I'm done. I'm going to extend the pause into an ongoing stage of free style use of my time.

Option #3 - Part-Time - I Need to Rebalance Priorities

I want to downsize the time I spend working. I need to imagine my ideal schedule - partial days? Partial week? Partial year? What work schedule matches my other life priorities and my mission-based goals?



IMPLICATIONS: Get ready to negotiate and to offer creative options for how another organization can get the best from you in the time frame you desire.

Fork #5. Do I want to continue working with or for the same organization, issue, field, movement? Or do I want to do something completely different?

FORK #5: ISSUES, MOVEMENTS, IDEALS

What does the world need from me now?

Option #1 - Shift to a New Issue

It is time to shift my attention to a new emerging issue or one that has been sidelined during my peak work years. I am drawn by curiosity and passion to an idea or movement where I know I can be useful even though it is new territory.



IMPLICATIONS: This will be adventurous and could involve a steep learning curve. Use existing contacts to network your way to your new area of interest. Think about ways to make a strong case for how your experience in one field bridges to the next.

- 1 What am I passionate about and why?**
- 2 What issues/movements need a person with my skills?**
- 3 Where am I likely to find meaningful work?**

Option #2 - Stick with the Issues/Movements that Have Been Emblematic in My Life

The issue I'm devoted to (e.g. education, human rights, environment anti-violence, health, etc.) is my lifelong passion and I want to find a new role related to this issue/movement. I may want this new role in my current organization.



IMPLICATIONS: Your skills, knowledge and networks will be immediately useful. If you stay in the same organization you will change roles and gain new perspective or you may want to take a fresh approach by changing organizations and roles or working in a different way (e.g. switch from service to advocacy.)

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1. PHYLLIS SEGAL, FRANCES KUNREUTHER AND STEPHANIE CLOHESY. “The New Life Cycle of Work: Long-Term Nonprofit Leaders Prepare for Their Future. 2012. www.buildingmovement.org/pdf/TheNewLifecycleofWork.pdf
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