What Are the Facilitators and Barriers to Participation in Meaningful Occupations of Retired Community Based Older Adults?

by

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Abstract

Retirement is an important life transition, with a growing population of individuals in this stage. This thesis explores the meaningfulness of occupations retired individuals engage in and the barriers or facilitators to engagement.

This study used in-depth interviews to explore meaningfulness of occupation of eight community based retired adults. Transition into retirement, personal choice and meaning and satisfaction influenced participation in occupations and overall satisfaction with retirement. Personal choice regarding participation in occupation influences an individual's sense of satisfaction in occupations and retirement life. Participants expressed establishing retirement life, occupations and social interactions as being affected by personal choice. Meaning attributed to occupations was important as was the intensity of the meaning. The importance of exploring intensity of meaning, high or low, was also apparent in the study. Therapists can use the results with their retired clients to build opportunities for choice and increased satisfaction with occupations.

List of Abbreviations Used

CAOT………………. Canadian Association of Occupational Therapists

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Chapter 1

Introduction

In Canada in 2005 there were 4.8 million individuals 65 years of age or older, accounting for 13.1 percent of the total population (Turcott & Schellenberg, 2007). It has been estimated that by the year 2036 these numbers will increase totaling 9.8 million persons 65 years of age or older with the percentage of the population being represented almost doubling to 24.2 percent (Turcott & Schellenberg 2007). Physical changes occur as we age, impacting on our overall health, but changes in our mental well-being, roles and occupations also affect health. Older individuals are at risk for chronic diseases and physiological changes, however, many are motivated to be active, remain independent and in their own home for as long as possible (DiPietro, 2001; Ha 'ggblom-Kronlo', Hultberg, Eriksson & Sonn, 2007; Johannesen, Petersen, & Avlund, 2004). Individuals may have to change or limit their participation in roles they previously engaged in (Stevens-Ratchford, 2005). Perhaps entire activities or leisure pursuits once enjoyed and engaged in now may need to be modified or abandoned due to physical or medical changes.

This topic is important to occupational therapists as we have an important role in ensuring older adults are able to maintain healthy, active and satisfied lives (Borell, 2008; Law, 2002; Wilcock, 2006). The Canadian Association of Occupational Therapists (CAOT) advocates though their position paper, "Occupational therapy and active living for older adults," that involvement in society through engagement in meaningful occupation is crucial through all of life stages. Occupational therapists emphasize the importance of active participation of seniors in self-care, leisure and

productive occupations through "whatever way they can" (CAOT, 2002, p.19). The importance for the individual to be able to choose occupations that provide meaning has been well documented in the literature (Borell, 2008; CAOT, 2002; Law, 2002; Stevens-Ratchford 2005; Townsend & Polatajko, 2007; Wilcock, 2006;).

Participation in occupation is fundamental at all ages to maintain a sense of well-being (Ball, Corr, Knight & Lowis, 2007; CAOT, 2003; Law 2002). Occupation has been defined as "groups of activities and tasks of everyday life, named, organized and given value and meaning by individuals and a culture" (CAOT, 2002, p. 181). This is the core tenet of occupational therapy, and forms the professional basis from which intervention is based.

This research explored engagement in meaningful occupations of retired adults living in the community and the facilitators and barriers to participation. The information about and findings of this research are presented in the following chapters. Chapter one provides an overview of the study; to explore the ideas behind importance of participation of retirees in meaningful activities within the realm of occupational therapy and society in general. Chapter two reviews literature related to the topic of this study, focusing on retired adults, occupational performance, occupational identity, occupational balance, retirement, meaningful occupation and satisfaction. Chapter three is the method section in which the study is explained in detail including the tools used, data collection methods and the sample of who participated. Chapter four presents the results of the study while chapter five looks at what the results mean to the retirement population and occupational therapists. The conclusion chapter summarizes

what was identified and learned from the study and discusses implications for potential

future research.

Chapter 2

Review of the Literature

A review of the supporting literature was completed centering upon older adults and their occupational participation, occupational identity, occupational balance, retirement and meaningfulness of occupation. Literature was searched online through Pub Med, CINAHL, Embase, Medline, OT Seeker, Cochran Library and Google scholar using key words of occupation, activity, participation, engagement, older adults, seniors, independence, retirement, and community.   The literature found was used to explore engagement in occupations and the meanings older adults place upon these activities. Retirement, its meaning and how this change may influence occupations and engagement is also discussed. Additional literature on satisfaction was reviewed after data analysis was completed as the significance of overall satisfaction with retirement became apparent to the study.

Population of Interest- Retired Adults Living in the Community

Medical advances have aided in keeping people healthy for longer than ever before. However, with the burgeoning strata in the older age category, health and occupational performance issues in the age group are increasingly apparent.   As individuals age, changes occur physically, which often leads to a change in participation in meaningful occupations. In some instances, this change manifests itself as a reduction in participation, for others it might be a complete cessation of engagement. Decreased muscle strength, balance and stamina may lead to inactivity, isolation and overall decreased safety in the home (Bryant & Trew, 2006; Patala & Shumay-Cook, 1999; Rooks, Kiel, Parsons & Hayes, 1997; Tinetti et al.,1994). Non-physical changes,

such as mental health decline (Bailey & McLaren, 2005; Doshi, Cen & Polsky, 2008; Szinovacz & Davey 2004), role changes (Bryant & Trew, 2006; Hewitt, Howie & Feldman, 2009), losses (Johannesen et al., 2004; Stevens-Ratchford, 2005), and financial considerations (Hewitt et al., 2009) can also be also encountered by the older adult. These factors can lead to isolation, a decline in mental well-being, and decreased participation in occupations.

Older adults living in assisted living/nursing homes, in comparison with their community based peers, have a more structured daily schedule, a more restricted living environment and may have more physical and/or cognitive issues which may limit participation in meaningful occupations (Horowitz & Vanner, 2010; Johannesen et al, 2004; Karakaya, Bilgin, Ekici, Köse, & Otman, 2009). However, older adults living in the community, healthy or frail, may have just as high a risk for occupational performance issues as their counterparts living in assisted living facilities/nursing homes. This is because they may be more socially isolated, have less regular contact with health care professionals, and may have less opportunities presented for them to engage in participation (Cloutier-Fisher & Kobayashi, 2009; Gilmour 2012; Horowitz & Vanner, 2010). For the purposes of this study, the focus is on community based adults who need to plan and execute their daily schedules; create opportunities to engage in meaningful occupations and pursue social interactions with others.

Johannesen, Petersen and Avlund (2004) stressed the importance of helping older adults remain active and as independent as possible, ultimately enabling them to continue to live in the community in their own homes. Karen Whalley Hammell (2009) has postulated that independence is a Western cultural phenomenon, an ideology not

shared by much of the world's cultures. "Indeed, minority world values of independence and self-reliance are alien to those cultures that value social relationships, interdependence, reciprocity, mutual obligation, and belonging (Iwama, 2006; Lim, 2004)." For the purposes of this research it is acknowledged that not all cultures embody the same value system as we ascribe to in our western values of independence in Canada.   Since this study is being completed in Calgary, Alberta the importance of independence and individualism (Whalley Hammell, 2009) will be used as the foundation for questions and themes throughout, acknowledging however that even within Calgary and Canada there are many ethnicities and cultures which also may not share these values.

Borell (2008) emphasized that older adults should not be limited in their pursuit of meaningful occupations and everyday tasks simply due to their age. Much has been written examining the leisure activities of older adults (Agahi, Ahacic and Parker 2006; Lennartsson & Silverstein 2001; Pereira & Stagnitti 2008; Sellar & Boshoff 2006; Silverstein and Parker 2002) and the physical activity of retirees (Bailey and McLaren 2005; Bryant and Trew 2006; Jonsson, Borrell and Sadlo 2000; Pushkar et al 2010). My study explored participation and meaningfulness of adults' post retirement occupations in an attempt to gain insight into what facilitates and what creates barriers to engagement in participation. With the increasing numbers of retired individuals, it is important we have awareness into their needs and issues. This will assist in help to provide insightful information into ways barriers can be overcome to increase meaningful engagement.

When individuals retire from the workforce, there is a change in their current roles (Bryant & Trew, 2006; Denton & Spencer, 2009; Hewitt et al., 2010; Unruh, 2004), a shift in their occupational and self-identity (Unruh, 2004) as well as changes to the occupations they participate in (Bryant & Trew, 2006). Some individuals may welcome and embrace these changes seeing new opportunities for engagement and meaningfulness. Others may feel a void with the loss of a major life role and identifier, and become withdrawn and engaging in occupations with little meaningfulness or satisfaction.

This study focused on individuals post retirement to see if commonalities exist in those individuals who participate in meaningful occupations and are satisfied with their lives, as well as commonalities for those who are not meaningfully engaged. By examining what individuals see as facilitators and barriers to participation we can then share this information with retiring adults to assist them in this life transition. For retired adults who are experiencing difficulties, facilitators identified in this study may be used to overcome barriers in the way of meaningful engagement. New information generated from the study can be used to gain a further understanding of the issues retired individuals face.

Occupational Participation of Older Adults

Participation in occupation is fundamental to health and everyone has the right to participate in meaningful occupations (Stadnyk, 2008). Many issues can influence an adult's participation in occupations, however not all issues will be pertinent to each individual. Physical limitations may be factors for some retirees, while others may have

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no physical disabilities whatsoever (Bryant &Trew, 2006; Buchman, Boyle, Leurgans, Barnews, & Bennett, 2011; Griffith, Caron, Desrosiers & Thibeault, 2007; Stevens-Ratchford, 2005). Some individuals may have motivational barriers, or financial barriers; and still others may have no limitations at all (Bailey & McLaren, 2004; Haggbloom-Kronlo et al., 2007; Stevens-Ratchford, 2005, Szinovacz & Davey 2004).

Physical barriers are one aspect which may affect an individual's ability to participate in meaningful activities. Physical barriers are usually related to the physical capabilities of the older adult which may limit participation in previously performed occupations. Some older adults may experience difficulties with mobility, co-ordination, endurance and vision making getting out into the community problematic (Buchman et al, 2011; Hebert et al, 2007; Pushkar et al., 2010). Issues related to community mobility, including but are not limited to uneven terrain, stairs, wheelchair inaccessibility of facilities and distances needed to be navigated on foot or by wheelchair to get to a person's ultimate destination (Rosenberg, et al., 2013). Another environmental issue to community- based activities could include inclement weather and/or transportation issues for those who may require a drive and for those where public transportation is not manageable.

Occupational marginalization has been defined as the "exclusion from the opportunity to participate in society's valued occupations; relegation to invisible or less valued occupations in which participants have no choice or control" (Stadnyk, 2008, p. 461). An example of this would be a 70-year-old healthy widow who is retired, loves being outdoors and completing yard maintenance. Her adult children visit often and over the last few years have refused to let her complete "heavy" outdoor chores like

lawn mowing, raking and snow shoveling. They insist on her "relaxing and let others do those tasks for you- you don't need to be doing those things at your age".   By limiting the mother's participation in valued, meaningful activities the adult children are effectively marginalizing her, even though they believe they are acting in her best interest.

Also, affecting participation is an individual's own motivation to engage in activity. Johannesen et al. (2004) found that self-determination influences the health of older adults.   This cross-sectional study was part of a larger longitudinal study (Legarth, 2001) looking at 85-year-old adults living in their own homes in Denmark. The aim of the study was to investigate whether social relations, continuity, self-determination and use of their own resources are associated with everyday life satisfaction. The results confirmed that continuity in everyday meaningful occupations, familiar routines, maintaining social relationships and not requiring specialized nursing care services (home care or assistive living accommodations) is important to satisfaction and well-being. This research supports the notion that an increase in mental well-being occurs when persons are engaged in meaningful occupations.

For community based retired individuals, the research into engagement in occupations is important, specifically the relationship between meaningfulness and health. Knight et al. (2007) reported that people at all life stages want to be meaningfully involved and as independent as possible. This study supported the view that engaging in meaningful occupations is an effective health promotion measure, lowering the individual's risk of mortality. While the concept of meaningfulness and the importance of independence may be culturally specific, this study examined the

productive occupations of adults over 60 years of age living in the community in the UK. Qualitative and quantitative methods were used focusing upon productivity, occupational choices and motivators. This study was comprised of a convenience sample that used many data collectors. Its relevance is in the altruistic motivators and the perceived health benefits of the participants as reasons for engaging in productive occupations. Altruistic motivators in this study were described as "doing something for others, making others happy, sense of doing something useful, putting something back and making a difference" (p.150).   The results support previous research showing that older adults value being active, contributing members of their community; with increased health and well-being when participating in meaningful occupations (Ball, Corr, Knight & Lowis, 2007; Glass, Mendesde Leon, Martottoli &Berkman, 1999; Wheeler, Gorey & Greenblatt 1998; Wilcox, 2001).

My study expanded on the present literature and explored themes as to how meaningfulness is determined by retired adults. Focusing upon barriers and facilitators of participation may be useful in our practice as occupational therapists to assist our clients to be engaged in meaningful occupations throughout their lifetime.

Retirement

For many older adults, a large portion of their lives have been spent working for monetary remuneration (Statistics Canada, 2011). As an individual becomes older, the roles that are pursued change and so too does the role of worker. These changes may be worker driven and voluntary or they may be mandated specifically by individual professions or generally encouraged by society (as evidenced by the age of onset of old

age security payments). The concept of retirement is familiar to many; however there are numerous definitions and meanings of the word (Bryant &Trew, 2006; Denton & Spencer, 2009, Statistics Canada, 2011).

Denton and Spencer (2009) evaluated over 45 studies or sources of data trying to establish a definition and indicators of retirement. They were able to formulate eight different indicators or measures of retirement: non-participation in the labour force; reduction in hours worked and/or earnings; hours worked or earnings less than a minimum amount; receipt of retirement income; left main employer; change of career or employment in later life; self-assessed retirement and a combination of factors (p.66-67). They concluded after reviewing all the sources that no one indicator has shown to be comprehensive and that all factors considered had worth but also had their limitations (p.73).

One aspect which was emphasized in the study by Denton and Spencer (2009) was the self-assessment of a person's retirement. With more people staying in the workplace longer (Statistics Canada, 2011) and with a plethora of ways one could change involvement in work, the concept of retirement can be nebulous.

The inability to consistently define retirement in the literature has shown that older adults face different challenges than they did decades ago. It is not uncommon now for older adults to continue to work for financial remuneration post retirement. It can be the number of hours that the retiree may work, the area of work (can be a complete change in fields from a previous career or not), or the amount of income still needed which may drive the creativity and flexibility of this generation of "retirees" into creating their own version of retirement. Presently there are numerous options available to the older adult

in terms of retiring (Bryant &Trew 2006; Denton & Spencer 2009; Hewitt et al., 2010).

Retirement then is a self-defined concept. Even though many people continue to work

into retirement in this study addressed post retirement lives of older adults who are no

longer receiving payment for employment; or who are receiving less than 50% of their

income from paid employment.

Occupational Identity

As previously mentioned, not all individuals who are retired have a physical

limitation or health issue. Some individuals who are retired are younger, healthy and

are busy with meaningful, satisfying lives. However, there is a segment of the

community based retired population in western culture who are focused upon remaining

independent; and see a loss of independence as a decline, possibly leading to a

decrease in identity, self-esteem and meaning in life (Yuen, Gibson, Yau, & Mitcham,

2007).   Occupational identity has been described as the composite of an individual's

occupations over time, with an ongoing interactional aspect between the individual and

their environmental context (Unruh, 2004). This means that an individual constructs an

identity based upon the occupations he/she engages in and this identity changes based

upon the subjective experiences and the values society, to which the individual belongs,

places on these occupations.

The occupational identity of older adults who have retired from their previous jobs

living in the community might be in transition, especially if retirement is recent (Bryant &

Trew, 2006) or through crisis (Unruh, 2004). Continuity of occupations is a key in

establishing an identity, yet in this population retirement- either voluntary or forced-

creates a huge change in the type and frequency of occupations an individual engages in. This break in continuity of a productive occupation can create stress and a potential deterioration of occupational identity (Griffith et al., 2007; Unruh, 2004). Think of a person who has been a teacher for 30 years and has recently ceased teaching. Much time and energy over those years has gone into their identity as a teacher. A sudden void in this aspect may challenge their view of themselves and their sense of self-worth now that they are no longer a teacher. It may take time to refocus that person's identity, especially if they have had few occupations aside from teaching in which they found meaning (Griffith et al., 2007). It is also important to note that in this example the profession of teaching is a respected career, one that society places a high value upon. Once that occupation is no longer an active part of a person's life, they may struggle to find the perceived level of acceptance and respect in the occupations they engage in following retirement (Unruh, 2004).

Older adults may have ample unrestricted time post retirement. Some older adults may view this time as a reward for the years of hard work they accomplished- and enjoy a period of rest, or a chance to spend more time doing previously enjoyed occupations or trying new occupations now as they are not limited by work obligations (Bryant & Trew, 2006). However, if there is indecision in regard to what to do with this time, there could be negative effects upon their occupational identity and overall health and well-being (Ball et al., 2007).

Along with free time, older adults are also faced with other changes which may affect their occupational identity. A change or loss of roles associated with changes in physical abilities and in their relationships with others can also impact an older adult's

sense of who they are and what they are now able to do (Bailey & McLaren, 2004; Ball et al., 2007). Perhaps the rheumatoid arthritis in their knees will no longer allow them to play golf or perhaps a loss of a spouse or close friend takes away an identity or role they have maintained for decades. The older adult is in a more vulnerable position than their younger counterparts due to these types of changes. These losses require mourning and a reconfiguration of how they construct their identity.

Occupational Balance

Occupational balance is "a temporal concept since it refers to allocation of time use for particular purposes and is based on the reasoning that human health and well-being require a variation in productive and leisure occupations" (Townsend & Polatajko, 2007, p.369). Yerxa (1998) proposed that "to be healthy people need to create an individualized balance of meaningful occupations through discovering, developing and acting on their own interests and by participating in the rules, habits and rituals of their cultures" (p.204). Older adults may be at risk for an imbalance in their occupations. Although these individuals have more unrestricted time available (as discussed above), they might have physical limitations which will impact upon occupations, transportation concerns, and financial considerations - all impacting on their ability to have a balance in occupations.

Older adults may experience an imbalance in occupations with self-care becoming the main aspect of their daily occupations (Stadnyk, 2008). Ball, et al. (2007) points out that the older population may have a larger part of their day that is free of time commitments due to retirement. Researchers have reported that as individuals get

older, time spent alone can increase, and participation in leisure pursuits decrease (Frick & Unsworth, 2001; McKinnon, 1992). If older adults have more time which may not be structured and time spent alone increases as leisure pursuits decrease, then these individuals are at risk of becoming socially isolated and disengaging with a resulting decline in health and well-being.

With the large numbers of older adults and relatively small number of jobs available to this demographic of individuals, it would not be difficult to deduce that their productive paid occupations may be minimal even though Knight et al. suggest that "older people do not necessarily want to give up paid work altogether" (p.147). Volunteer occupations may abound, however there may physical, financial or transportation issues to be considered (Komp, Van Tilburg, & Broese van Groenou, 2012; Stevens-Ratchford, 2005; Tang, 2006; Wheeler et al, 1998). Physical deterioration in health may result in some individuals not able to perform job demands which have physical requirements such as lifting, standing or sitting for long periods or being able to complete the required shift hours (Komp, et al., 2012). Others, may find that they are unable to access buildings, or secure reliable transportation (Rosenberg et al., 2013). Without paid occupation and the resulting income, many individuals may be reliant on a fixed income which may not be sufficient to cover costs incurred in participating in a volunteer occupation (Tang, 2006). Depending upon financial circumstances, an older adult may find they are unable to participate in desired leisure occupations due to a lack of funds (Tang, 2006). Leisure occupations, particularly ones that have a supportive social network and access to social facilities, have been shown to have a positive impact upon health and well-being (Ball et al., 2007; Martinez,

Crooks, Kim, & Tanner, 2011). With the possible life changes of the older adult such as grown children leaving or gone from the home, retirement, physical changes, decreased social contact and financial and transportation issues; a balance as defined by the individual, may be difficult or even elusive to attain.

The Canadian Model of Occupational Performance and Engagement (Townsend & Polatajko, 2007) proposes that occupations exist within the interactions an individual has with their environment. According to this model, occupations generally fall within one or more spheres of self-care, leisure and productivity. Which occupations are considered to be leisure, or productive or self-care is not as important to the occupational balance of an individual as the meaning the older adult places on those occupations. Whether a fitness group is considered to be leisure or self-care is secondary to feelings of inclusion and satisfaction that they derive from that engagement. One study, through an analysis of the concept of balance, suggest that imbalance results when obligatory and valued occupations collide (Backman, 2004). There needs to be a balance in the occupations a person engages in, however that balance does not mean that all areas need to be evenly represented. The balance should focus around the meaning that the occupations have for the individual and the sense of emotional well-being and overall health that emerges from participation in those occupations (Matsuka & Christiansen, 2008).

Meaningfulness of Occupation

The research has shown that participation in meaningful occupations contributes to a person's independence, health and well-being (CAOT, 2003; Johannsesen et al.,

2004; Yuen et al., 2007). In our own lives it is easy to see the difference when we are participating in an occupation we feel is meaningful to us and when the occupation is less meaningful in nature. By definition meaningful occupations are those that are chosen and performed to generate experiences of personal meaning and importance (CAOT, 2002). What drives personal meaning is one individual's beliefs built upon the years of experiences and values held by the self and society (Griffith et al., 2007).

Meaningful occupations can also include occupations which may have an obligatory nature to them as well. Caregiving, for example, is an occupation which may feel essential in nature and can be incredibly meaningful. This meaningful activity may produce feelings of satisfaction, yet could also produce feelings of discontent for those who may feel overwhelmed with the responsibility, or unsupported in some manner (Collins and Swartz, 2011; Saban, Sherwood, deVon & Hynes, 2010; Savundeanayagam, Montgomery & Kosloski, 2011).

Griffith, Caron, Desrosiers, and Thibeault (2007) completed a qualitative study of eight community based older adults who had experienced a loss of autonomy. This study addressed how meaning is given to occupations, as well as the definition of spirituality of these older adults. The results indicate that spirituality is not central to the process of giving meaning, but that it is a dimension of the process between (occupational) identity and meaningful occupation. When a person experiences loss of autonomy the individual begins an adjustment process where changes occur to how the person sees and defines who they are now. This change occurs over time and is dependent upon social, psychological and spiritual constructs. This article is particularly relevant to the proposed research as it was conducted using an aging Canadian

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population, giving us an important perspective of spirituality, identity and meaningfulness in our culture with older adults.

Law (2002) stated that in order for participation in an occupation to be meaningful, there must be feelings of choice or control, a supportive environment, focus on the process and not the outcome, and a sense of challenge. She also states that it is through participation in occupation we acquire skills, obtain competency, connect with others and find purpose and meaning in life. Meaning in occupation is important for the older adult as their occupational identity may be changing through retirement, they may be battling physical changes and/or autonomy loss, and they may be facing many other changes, with worries of competence and independence creating stress. My research addresses how retired adults attribute meaning to the activities they participate in while also addressing facilitators and barriers to engagement. By examining how meaning is ascribed it may then be possible to see the impact meaning has on engagement.

Satisfaction in Retirement

Previous research has indicated that engagement in activities in which the individual deems meaningful is an important consideration when looking at satisfaction and retirement (Bowling & Dieppe, 2005; Ferri, James & Pruchno, 2009; Potocnik, Tordera & Peiro, 2011; van Solinge & Henkens, 2008). Van Solinge and Henkes (2008) in their study acknowledged the difference between adjustment to retirement and satisfaction with same. They believe an individual "can adjust to a new situation without enjoying it, and the fact that an outcome is positive does not necessarily imply that adjustment was easy". Thus, an individual can adjust to retirement and be engaged in

various occupations, but not be satisfied. Satisfaction addresses the degree of happiness or contentment with life and the occupations a person engages in (van Solinge & Henkes, 2008). This, in turn provides a descriptive explanation for how a person is enjoying their current lifestyle. This is an important distinction as it acknowledges that a lifestyle can be filled with meaning or meaningful occupations, but not equate with feelings of happiness or satisfaction.

Potocnik et al. in 2011 wrote about five different levels of retirement satisfaction which were identified according to a correlation between expectations about retirement and the individual's actual retirement situation. Their findings showed higher levels of satisfaction and positive feelings were among those individuals who perceived they retired voluntarily, and followed their retirement intentions. This sense of personal choice for the timing of an individual's retirement was supported in the literature (Isaksson & Johansson, 2000; Kimmel, Price & Walker, 1978; van Solinge & Henkens, 2008) and emphasizes the need to address how an individual retired and what their expectations of retirement might have entailed (Potocnik et al., 2011; van Solinge & Henkens, 2008). Expectations an individual has for their retirement can influence their level of satisfaction (Heaven et al., 2015).

When a discrepancy exists between what a person thinks retirement should look like and what their reality entails may affect satisfaction, health and an individual's overall well-being (Heaven et al., 2015).   The Heaven et al. (2015) study found that for many, retirement was not fully planned, was shaped by unforeseen circumstances with variables present such as being able to identify what was personally meaningful to them, all influenced levels of satisfaction and wellbeing. Well-being was identified as a

process that was able to change and evolve according to their expectations (transition) into retirement, how the individual viewed their new roles and lifestyle and their ability to influence their future (exert control onto their lives). Examination of the variables of well-being show how these expectations have an influence on levels of satisfaction.

It is worth noting that retirement satisfaction can also be influenced by individual's feelings of usefulness (Ha Ggblom-Kronlo et al., 2006), participation in meaningful activities and perceptions of their physical health as described in the previous sections.   Satisfaction is a complex construct influenced by many variables and creating influence over overall retirement outlook and lifestyle.

As the literature demonstrated, retirement is a time of transition during which this life phase can be influenced by many factors. Participation in occupations, particularly those that have meaning and are satisfying, are paramount in assisting individuals navigate their retirement lives. Issues surrounding choice, health, motivation, and changing occupational identity all play a role in determining meaningful occupations. My study will build upon these issues while exploring engagement in occupations. Little has been written regarding meaningfulness of occupations and its relationship with the level of satisfaction in retirement life.

Chapter 3

Method

The research question for this study was: What are the facilitators and barriers to participation in meaningful occupations of retired community based older adults? The research explored the engagement in meaningful occupations of retired adults living in the community and the facilitators and barriers to participation. Through in depth interviews the study examined what factors influenced participant's motivation and engagement in occupations. The results contribute to understanding some of the issues of those who are retired or are facing retirement.

The research design for this study was a naturalistic inquiry using a qualitative design. This view focused on perceptions of the older adult and how they viewed themselves and the world around them. The retired adults were able to recount their experiences, perceptions and feelings about meaningful occupations and participation. The goal was to learn about the retired adult's perspective and not solely his/her actions.

Data was collected from the participants using a semi-structured in-depth interview completed at the home of the retired adult or over the telephone, according to the preference of the participant. The in-depth interview allowed for probing to occur for clarification if necessary to get a complete picture. Having a semi structured style provided uniformity for the interviews, while allowing for questions to evolve when pertinent information was not being elicited. The participants were able to help guide the interview as it progressed along. This was done by allowing participants to expand on topics of particular importance to them and to explore topics they thought were relevant if they had not been previously been asked about.

Sample

The sample population for this research project was comprised of community based older adults who self-identified as being retired. For this project, the older adults were living in their own homes in the community.

The sample for this project included 8 individuals living in Calgary, Alberta. This sample was limited to 8 individuals due to the in-depth nature of the interviews that provided rich information and the logistics of completing the thesis in a finite amount of time. Despite the small sample the individuals recruited were varied and allowed for the exploration of a variety of experiences (Sandelowski, 1995). The selection of individuals interviewed was open to include varying ethnic backgrounds, abilities and disabilities, and age. All participants were adults, and regardless of their age, all self-identified as being retired and had been retired within ten years. The participants could still be employed; however, remuneration could not exceed 49% of their monthly income to be eligible. Other variables of enjoyment of retirement, marital status and gender were screened to ensure a range of participant characteristics were represented in the study. Inclusion of these characteristics (years post retirement, enjoyment since retirement, marital status and gender) allowed for an examination of how these characteristics influenced the extent to which older adults are deprived of, or engage in, meaningful occupations.

The inclusion criterion that all participants be retired within the last ten years was implemented so individuals could easily draw on their recent memories and feelings from when they were working, their transition into retirement and life post retirement. The sample included married and widowed individuals, as well as a balance of males and females.

The sampling process took great care to include individuals who are satisfied and engaged in meaningful activities post retirement and those who feel less engaged and satisfied. This was accomplished by highlighting the need for both perspectives on advertisements, recruiting articles and in conversations with potential participants and the researcher. As the study progressed and the numbers in each group began to diverge, more emphasis was placed upon recruiting individuals who self-reported feeling less engaged and satisfied as they were the smaller numbers represented. This allowed for anticipated themes to emerge from the two situations, highlighting similar contributing facilitators and barriers.

Exclusion criteria for the sample included individuals with cognitive deficits limiting self-analysis and expression (as this would limit the information they would be able to provide), individuals who have hearing issues who may find it difficult or straining to participate in an in depth interview, individuals residing in assistive living or nursing homes (as described above), individuals who do not speak English or have a translator (as this author only speaks English), and individuals, regardless of age, who are still gainfully employed as their primary source of income (as they would not be considered retired).

Recruitment Strategy

Recruitment for the study was through community agencies concerned with older adults and links around Calgary. Posters for recruitment were posted on bulletin boards at The Kerby Centre (Appendix A) as well as advertisements into the Kerby newsletter. The Kerby Centre is a not-for-profit organization that is committed to enhancing the lives of older adults. Their mission is to "assist older people to live as well as possible, for as long as possible, as residents in the community" (Kerby Centre, 2017).

Also, an advertisement was posted on Kijiji to access the older adult population who use this form of media and in eight community newsletters within the city of Calgary (Appendix C) for recruitment purposes.

Recruiting continued until 8 interviews, with a heterogeneous composite of individuals, occurred. Individuals were screened by the researcher on the telephone prior to involvement in the study. The screening questions assisted in ensuring there were differences within the participants in regard to gender, marital status, years' post retirement and retirement satisfaction. Effort was made during the screening process to have individuals from different sectors of the city by placing the advertisements in two community newsletters in all four quadrants of the city. Ethnic background and socioeconomic status, as well as local opportunities can be influenced by the sector of the city in which the older adult resides.

Recruitment posters and advertisements provided contact information (phone number and e-mail address) for the researcher. Interested persons contacted the researcher for inclusion in the study. A brief overview of the study was offered to the individual, screening questions were asked to ensure inclusion criteria were satisfied (Appendix D), and a time was then arranged for the interview to occur. A letter was then mailed or e-mailed to the individual outlining the study questions, the risks and benefits of participating in the research study and the amount of time required to participate in this study (Appendix E). Also, confirmation of the agreed upon date and time for the interview, and a copy of the consent to participate form was included in this letter.

Interview Procedure

The written consent form, sent to the individual beforehand, was reviewed with the participant prior to any study questions being asked. Written agreement was obtained prior to starting the interview (see consent form, Appendix F) with consent also being obtained for recording of the interviews. Recording the interview was to ensure accuracy of information. Consent was also obtained for follow up by telephone if clarification of information gathered was needed, or if supplemental information was required. The interviews were completed over the telephone or in person depending on individual preference, and lasted approximately one hour. The choice of a phone interview allowed the individual to participate and remain in the comfort and security of their own home. One individual chose to participate in a telephone interview, while the other participants completed face to face interviews. The participants were offered a copy of their interview once they were transcribed so they could clarify or remove any part of the interview from the transcript if they chose.

Data Collection

The method used for the collection of information from the older adult participants was completed using a qualitative in-depth interview. The in-depth interview is a method of collecting information through a ``relatively unstructured interview that is utilized to capture informants` perspectives on topics or issues of relevance in their lives`` (Laliberte-Rudman & Moll, 2001, p.24). The in-depth interview allows the interviewee to guide the interaction between interviewer and interviewee. Having the interviewee guide the direction of the conversation allows for their self-evaluated important experiences and perspectives to be highlighted and acknowledged. An in-depth interview begins by asking questions to understand each individual's unique perspective, however ``the goal is to see how that

person`s perspective fits within the collective understanding of the issue or topic area``
(Laliberte-Rudman & Moll, 2001, p.26). This is important as it takes a singular experience or
perspective, then sees how it compares within the larger group. It is also important to
emphasize that it is the individual's perspective, not his or her actions which are being
discussed.

The unstructured nature of the in-depth interview allowed for modifications as
subsequent interviews occurred. During the initial interviews it became apparent that certain
themes were emerging which led to further exploration of the topic via new questions in
subsequent interviews. It became necessary to change the wording of questions, providing
more prompts when it became obvious the participants needed more direction to elicit the
desired type of information.

DePoy and Gitlin (2005, p. 199) point out that using questions which are open ended "is
particularly important in the beginning stages of the interview, when the investigator is trying
to become familiar with the language of the group and everyday occurrences." They
highlighted the importance of conducting the interviews to ensure the language was common
and understood by both parties. This ensured that the meanings of topics discussed were
bilaterally understood, which enables the information to be more complete and relevant. This
method provides a glimpse into ``subjective human experience or develop insight into how
individuals think about the world`` (Laliberte-Rudman & Moll, 2001, p. 27).

In the current project, using the in-depth interview was an effective means of finding out
what the older adult perceived to be barriers to participation in occupations they believed
meaningful. It allowed for an exchange between interviewer and the older adult allowing for
deeper probing into the issues by asking clarification questions to uncover true and perceived

barriers. This style of inquiry allowed for refinement of questions as interviews progressed, thereby exploring issues important to the older adult that might not have been addressed through other research methods (for example, a questionnaire).   When attempting to ascertain how older adults give meaning to the occupations in which they participate, it is important to gather information on the older adult's perception of their place, and what they do in their world. Also, exploring barriers to participation in occupations look directly at how the older adult sees the world around them and their ability to be a part of their environment. These two main foci of the research question relate directly to human subjective experience of how older adults see themselves within the world around them.

Finally, the in-depth interview encouraged older adults to recount as many of their thoughts as possible. Removing the need for the time and effort to write complete (and sometimes lengthy) answers to set questions and return their responses encouraged subject compliance and complete gathering of necessary research data.

For the purposes of this study the process of conducting the interviews could have been over the telephone or a face to face meeting, both having their benefits.   One of the central benefits to a phone based interview was that it allowed the participant to be in the safety and comfort of their own home without having the researcher, a person unknown to the participant, coming to their home.   For the older adult population opening their home to an unknown individual might have increased the feeling of risk and vulnerability thereby potentially limiting the numbers of adults who would volunteer to be in the study. An additional consideration was that the interviews were conducted during the winter time when it is more difficult for outdoor mobility and arranging a community based meeting spot might have limited those who would have participated in the study. Finally, the older adult might feel

less intimidated by answering questions on the telephone and not having to look the researcher in the eye: thereby, providing more detail or more personal reflections. It is acknowledged however that there might be some loss of rapport and the ability to read non-verbal behaviors as a result of the interview not being completed in person.

Alternatively, conducting a face to face meeting might increase the ease of the retiree for answering questions. Rapport might flow easier when you can see the individual who is involved in the questions. A face to face interview also provided the researcher with the opportunity to read non-verbal signs and behaviors of the individual. Finally, given the highly diverse ethnic representation in the city of Calgary it might be easier for both the participant and the researcher to more clearly communicate with potential varying accents face to face.

With legitimate reasons for completing the interviews both in person and via telephone, it was decided that the retiree would have the decision in which manner the interview would be conducted. One individual elected to participate in the study through a telephone based interview while the other 7 participants engaged in face to face interviews.

Research Tool

The research instrument I used to direct the in-depth interview was a semi- structured interview guide.   The interview guide was modified from an existing interview guide, Final Interview Guide for Study Conducted with Seniors (Appendix G), as detailed in Laliberte-Rudman & Moll (2001, p.54-55)[1]. The research topics of that study included exploration of

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[1] The original study this questionnaire was used in was published in 1997 by authors Laliberte- Rudman, Valiant cook and Polatajko. In that publication however the questionnaire was not included and was found in a book chapter written by one of the authors of the original study years later (Laliberte -Rudman and Moll, 2001). Both references are used in my thesis, however when exploring issues around the research tool the reference cited will be the one which spoke about the study and had the questionnaire included.

seniors` perspectives regarding the meaning they attach to daily occupations and to explore

seniors` viewpoints regarding the factors that influence well-being (Laliberte-Rudman & Moll,

2001, p.29).

Laliberte-Rudman & Moll (2001) developed their interview guide based on a literature

review. The literature search provided the authors with suggestions on possible topic areas

to be included in the interview guide; and their clinical judgment and experience enabled

them to narrow the topic areas to five in number. The topics addressed in this tool were very

similar to the topics of my study and mirrored all pertinent information except barriers and

facilitators to participation. These issues were addressed by adding extra questions to the

previous rigorously developed tool by Laliberte-Rudman & Moll (2001).

The authors, Laliberte-Rudman & Moll (2001), developed the following topic areas:

description of activities, preferences for activities, personal relevance of activities, satisfaction

with activities and the relationship between activity and well-being. The topic area (and

subsequent questions) of 'description of activities' identifies occupations in which the senior

engages. This is important as it then allows for further analysis of these activities in

successive topic areas. The questions in the 'preferences for activities' and 'personal

relevance of activities' topic areas serve to explore the value and meanings the senior

attributes to each activity.

Meaningful participation has been defined as including a choice or control over the

activity, a sense of satisfaction, a sense of challenge from the activity and a sense of mastery

(Law, 2002). The interview guide questions in the topic areas of 'personal relevance of

activities' and 'satisfaction with activities' deal directly with the issue of meaningful activity

and how meaning is attributed to the activity by the senior.

Semi-Structured Interview Guide for This Study

Since the basis of the semi-structured interview guide was developed for a previous study (Laliberte-Rudman & Moll, 2001), the questions had already been tested and modified to ensure they were generating the type of information which answers the question/research topics of their study which closely resemble topics of this my study (See Appendix H for a comparison of the Laliberte-Rudman and Moll (2001) interview guide and the one used for the current study). With the previous study and this study being so closely linked in desired outcome information, the pre-tested questions used in the semi-structured interview guide allowed for confidence in the appropriateness of the guide for this population. In fact, the questions focus upon participation, meaning and satisfaction which mirrors the areas I wanted to explore during interviews.

The focus of this study is addressing what occupations are being engaged in and whether these occupations are meaningful and/or satisfying. Engagement in occupation is only one aspect of the study. Defining what the occupations mean to the older adult, what satisfaction they bring and how happy it makes them addresses the quality of occupations for these persons. The interview guide used in this study as outlined in Appendix G, has 2 sections added to Laliberte-Rudman and Moll's (2001) questionnaire. Questions addressing happiness in retirement and barriers to participation were developed as these areas were more aligned with the intent of this study. This was not a focus for the Laliberte-Rudman and Moll (2001) study who had included questions exploring the relationship between activity and well being. Their definition of well being was a complex construct that encompassed more

parameters than satisfaction that was being addressed in my study. Thus, this section was
not included in my study.

   This study addressed what facilitates and what limited a person`s involvement in
occupations. Question 6 explored this issue with the guidance of the probes. This question
was used to guide the understanding of the circumstances surrounding the occupations in
which these 8 individuals engage.

   Questions were added to the guide pertaining directly to potential barriers of participation,
expanding on the questions posed in the final interview guide by Laliberte-Rudman and Moll
(2001).   The section on the relationship between activity and well-being from the original
interview guide has been removed as this topic is not part of the current study. Thus, all
research objectives have been addressed in the semi-structured interview guide for older
adults and meaningful occupations study, this tool was an effective method to ensure the
necessary collection of relevant information for this study.

Data Analysis

   Eight interviews were completed and recorded to ensure accuracy of ideas and
wording from the participants.   Once all the interviews were completed, I transcribed all
the interviews and all the gathered data had to be examined and interpreted.   Many
researchers have explored the issues surrounding the analyzing of data collected in a
qualitative manner (Bradley, Curry, & Devers, 2007; Chenail, R. J. 2012b; Chowdhury,
2015; De Poy &Gitlin, 2005; Seers, 2012). Most commonly, an approach is used
whereby the collected data is reviewed, examined and then interpreted through
identification of themes along with their coding and sorting in an attempt to provide

further insights on a particular issue (Bontje, 2004; Chowdhury, 2015). Chenail (2012a) emphasizes that it is not simply being able to interpret what themes were in the data but also be able to describe and interpret what the codes and themes mean in relation to the data.

After each interview the researcher highlighted important issues from the interview in field notes as well as any information pertaining to the flow of each interview. Beginning the data analysis after the first interview was completed assisted in ensuring proper wording and structure of the interview questions to produce the most relevant and desired information (DePoy & Gitlin, 2005, p. 199; Sandelowski, 2000). As well, this provided the researcher with a chance to become more familiar with the information being gathered, leading to a better understanding when saturation of new information obtained (DePoy & Gitlin, 2005, p.250).

The eight audio-recorded interviews were transcribed into written form verbatim by me. I then reviewed each interview and any additional notes or changes were completed once all filed notes were reviewed and compared with the audio transcript. All participants were offered a copy of their transcribed interview; however, no interest was shown by any of the participants to review their interview once it was transcribed. I made notes throughout the process of reviewing each interview pulling out generalized themes as well as coding items of relevance.

I began my data analysis using a thematic analysis. I looked at the data and tried to code the occupations using occupational performance categories, such as self-care and leisure.   As the data analysis and coding progressed it became apparent that the information being pulled out was not proving highly interesting or meaningful

material. I then changed my approach to look at themes as they emerged, and began a more inductive analysis in consultation with my supervisor.

Codes were documented by using Microsoft Word's Insert Comment reviewing option and focused upon data that presented a particular construct (Chenail, R. J., 2012b). More than half of the coded translated interviews were then reviewed by my supervisor. By having my supervisor review the data analysis the meanings of codes and themes could be discussed as well as any potential researcher bias. Having a peer review the work being completed helps to provide rigor to the study (DePoy & Gitlin, 2005, p. 251).

Early codes were simply labels pertaining to the data and explaining what a specific concept meant to the researcher (Sandelowski, 2000). These descriptive codes were then reviewed in the context of the other interviews and with combining codes together larger themes began to emerge. Similarities arose within and between groupings of those who self-identified as being satisfied with retirement and those who self-identified as being not satisfied with retirement. These themes were again shared and discussed with my supervisor.

A pictorial schematic was designed to show the themes identified and how they related to satisfaction in retirement (See Appendix J). This audit trail not only assisted in lending more rigor to the study, but also in discussion with my supervisor helped to identify how the themes across participants appeared to merge and show unity or saturation with the overall concepts identified. A revised form of this pictorial representation then formed the basis for how the results were presented.

Quality Issues

In this study, as appropriate to a qualitative method, quality issues needed to be addressed. Quality issues are concerned with the integrity of the research. Ravenek and Rudman (2013) proposed bridging criteria of five items to address quality issues in qualitative studies which will be followed below including: social value of the research; thoroughness of data collection; transparency and reflexivity; coherence of approach; regard for participants.

In regard to this research the social importance of addressing the needs of the retired population cannot be underestimated with our aging society. Occupational therapists are well equipped to assist individuals to maintain meaningful and satisfying engagement in occupations throughout the lifespan, including the older adult. The findings of this study can be used to assist in retirement planning for individuals, and to provide insight for those who are currently retired.

To address the thoroughness of data an in-depth interview was completed with clarification and summarization included during the conversation to ensure accuracy. Also, question/prompt modifications were used if the data being gathered was not the targeted information. Once the data was collected, thoroughness of data analysis methods described in the previous section included coding, thematic analysis, checking codes with my supervisor and development of a pictorial schematic.

Transparency was ensured by describing in detail the process of recruiting the participants, obtaining consent, screening the potential participants and completing the interviews. During the recruitment process a difficulty arose recruiting participants who identified as not satisfied in retirement. I used word of mouth to discuss the study with

individuals in the community, however it is unknown whether or not this had any impact upon the eventual recruitment of individuals. It is unknown as no participant communicated that they were told about the study, and most used the terminology of "having seen the study and decided to contact the researcher." Also, to ensure transparency I included a section called "limitations" to address the perceived weaknesses I identified in the study.

Coherence of the research was addressed by using an adapted version of a semi-structured questionnaire used in a study looking at similar question as this study. The previous study had the questions already tested and modified to ensure they generated the type of information which answers the question/research topics. As stated in the previous section, the semi-structured interview guide developed for the research study aligned very closely with my study. Using this guide provided support for the accuracy of the data collected for this study and its method of data collection.

Ethical Considerations

Ethical approval for this study was received on February 8, 2013 by the Social Sciences & Humanities Research Ethics Board, Dalhousie University. The regard for participants in this study the fifth quality issue identified by Ravenek and Rudman [2013]) was addressed by Dalhousie University Research Ethics Board, my supervisor and myself. Also, my supervisor and I discussed and implemented various ways to ensure respect, integrity and gratitude. The interviews were recorded and kept on a locked phone until they were transcribed and then they were deleted. The participants were encouraged to complete the interviews in a manner which made them the most comfortable and any intrusions during the interview were

treated with patience and understanding.   The participants were told they could listen to the interviews or review the transcripts at any time (until the digital erasing of the interviews). The participants were also offered a copy of the completed thesis manuscript if they wanted a follow up to the completed project. Finally, no real names or identifier were included in the transcripts to ensure privacy of the participants.

For those who participated in this study there were no anticipated direct benefits to the participant. Potential benefits might include satisfaction from offering an opinion and insight into participation and happiness through every day activities. There was no financial remuneration for participation in this study. There were no anticipated to costs to any participant in this study.

The risks involved in this study were minimal and might include sadness and discomfort when talking about personal happiness and satisfaction, especially when exploring activities that individuals are not able to be engaged in at this time. The interview focused on all meaningful activities for the participants, and not solely on the activities which might have evoked feelings of sadness or grief. All individuals, before beginning the interview, were offered the opportunity to stop the interview at any time if they wished. If the individual were to show signs of discomfort (a change in voice/ speaking pattern, lability) or fatigue they would have been offered an opportunity to stop the interview at that time. They would have been offered a chance to resume the interview another day if they so chose. Another time would have then been arranged. They were also instructed that they may refuse to answer any questions they felt uncomfortable with and remain in the study.

Also, some physical restlessness might have occurred during the hour long interview. The individuals were instructed at the beginning of the interview to move around during the interview to minimize stiffness or fatigue.

Confidentiality and Anonymity

The participants in this study were not identified in any presentation, report or publication. No names were used and an alias was given to each participant within this report.

When direct wording, sentences or excerpts of a discussion are used in any report, presentation or publication then the quotation is attributed to the individual by their alias. Individuals are not identifiable. If reports arising from beyond this thesis document are shared by myself, care will be taken to use aliases and to suppress any information that might make it possible to identify individuals.

Every effort was made to ensure the confidentiality of all identifying information that was obtained in connection with this study. All data gathered was kept in a locked file drawer in the home of the investigator.

Chapter 4
Results

What are the facilitators and barriers to participation in meaningful occupations of retired community based older adults? This was the question behind this study; it specifically addressed meaningful occupations and the factors that encourage and/or provide obstacles to individuals as a means to shape occupational therapy outlook when working with this burgeoning population. With such a large segment of the population approaching retirement, or newly retired, learning what factors might encourage engagement in occupations could provide better understanding into retirement life. Conversely, obstacles or barriers to occupations could also give individuals or therapists better understanding and thereby increase satisfaction by having engagement in meaningful activities. In this chapter, I will describe the features of the participants and the main themes that were related to satisfaction with retirement. In the next chapter I will discuss how the results differed from the anticipated results, as well as three issues that add to knowledge about retirement and participation in meaningful occupations.

Recruitment

Eight individuals volunteered to participate in an in-depth interview for the project. Initially, the study was to include 8-10 individuals, however as recruitment began to occur it became evident quite quickly that finding participants in the group that were less satisfied was to be a challenge. Individuals who were happy and described being satisfied were all recruited within the first three months, as opposed to those less satisfied took up to 11 months to recruit. Once the interviews commenced, the issue of

satisfaction did not appear to impact the willingness of the individuals to talk openly in the interview. Of those interviewed, four identified as being satisfied with retirement and four identified as being less satisfied.

Participants

The participants ages ranged from 45 years old to approximately 70, however since age was not directly asked the ages were discerned from comments made in the interviews. As Table 1 demonstrates, approximately 62% were married therefore most participants were not living alone and would have some daily social contact with at least their spouse. Approximately 37% identified health issues which directly impacted their lifestyle and their satisfaction with retirement, however they did not all identify as being unsatisfied (25% of those who identified health issues also identified as being unsatisfied with retirement).

Table 1
Demographics of Participants

Participant	Satisfaction with retirement	Years Post retirement	Gender	Marital Status	Heath Status
Brian	Yes	2	Male	Married	Healthy
Ellen	Yes	5	Female	Married	Healthy
Shannon	Yes	4	Female	Married	Healthy
Tyler	Yes	8	Male	Widower	Issues
Bonnie	No	3	Female	Married	Healthy
Danielle	No	8	Female	Widow	Issues
Janice	No	6	Female	Married	Issues
Jocelyn	No	8	Female	Single	Healthy

Participants came from all four quadrants of Calgary, although the groups identifying as being satisfied and those being dissatisfied had only two common quadrants; the southeast and the northwest. The city of Calgary is divided into

geographical quadrants (Northeast, Southeast, Southwest and Northwest) with main traffic roadways as the dividing lines. There is more ethnic diversity in some quadrants than others; as well as variation in socioeconomic factors across the quadrants. Socioeconomic factors can be highlighted through property assessments and higher levels of apartments, low rental housing and less single family dwellings. All quadrants will have a mix of socioeconomic and ethnic diversity, however there are recognized differences between the four quadrants overall. There did not appear to be differences in supports, opportunities or barriers identified by the participants within the quadrants. For example, transportation was not identified as a factor even though some quadrants have easier public transportation access.

Participants in the group who reported being satisfied in retirement (satisfied group) had equal proportions of men and women, however the group who reported being less satisfied in retirement (less satisfied group) was made up of all women. No men fit into the less satisfied group despite efforts to recruit them.   Out of the eight participants, all (four) in the satisfied group were involved in a romantic relationship (three were married, one was in a relationship), while the less satisfied group was made up of two widows, one separated individual and one married individual.   Only one woman from the less satisfied group said she was working presently and estimated she might work up to two days a month.   No other participant stated they were employed presently, nor did anyone else have plans to get back into the workforce.   The average years of retirement varied between the groups. The satisfied group had an average of 3.5 years post retirement while the less satisfied group had an average of 6.25 years. The participants who made up the satisfied group consisted of those who had worked

as professionals being: a nurse; a minister; an engineer and a co- founder of an engineering company. Those participants who were in the less satisfied group had also been professionals (a teacher and a pharmacist) as well as an insurance company employee and an administrative assistant.

The Relationship Between Meaningfulness, Satisfaction and Personal Choice

Upon reviewing the data collected from the interviews a number of themes emerged when looking at meaningful occupations of retired community based older adults. It quickly became apparent that meaningful occupations did not always equate with satisfaction in retirement, and the facilitators and barriers to meaningful occupations had less impact upon retirement satisfaction or happiness than was initially speculated. The one finding that permeated throughout the results was the issue of personal choice. When a participant felt that they had an ability to exert some control, or choice, in a situation then it appeared the participant was more satisfied in their retirement and with their participation in their current occupations. Looking at the term "meaningful occupations" then became more complex as "meaningful" did not necessarily imply that a participant felt satisfied when participating in this occupation. Upon further examination, a participant's level of satisfaction was directly influenced by the presence or absence of personal choice in situations or occupations. The level of satisfaction with an occupation did not directly influence the meaning of the occupation but offered another dimension to the emotions defining "meaningful". For an occupation to be meaningful or purposeful it might mean it was engaged with or without satisfaction attached. Therefore, while meaningfulness of occupation is discussed throughout the results, themes related to satisfaction with retirement emerged as most

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important in the ways that participants described their experiences. Participants expressed their satisfaction in three themes which arose from the data:

1. Establishing retirement life

2. Occupations

3. Social interactions

All three of these themes were affected by the participant's sense of personal choice which was reflected in their participation and satisfaction in occupations. Therefore, personal choice and control was identified as a theme that cut across the other themes. The barriers to engagement in meaningful occupations, along with a decreased sense of personal choice, will be addressed within the sections below. The facilitators for engagement in meaningful occupation were not identified as concrete factors, however they are more a direct result of personal choice, and perhaps pre-retirement outlook or personality. Pre-retirement outlook could not be determined from the study as these individuals were not interviewed prior to retirement, however those who conveyed an optimistic outlook during their interviews generally were engaged in more activities and reported feeling more satisfied with their lives. Their optimistic outlook was evidenced by speaking in a positive manner regarding their outlook, recounting positive stories, and speaking with contentment and positivity in situations where factors could be viewed as obstacles.

In the following sections, each theme will be explored highlighting satisfaction and its relation to the individual's retirement occupations and lifestyle. The sections will be explored beginning with establishing retirement life as this is seen as the beginning point of this study. Establishing retirement life really talks about the process of figuring

out retirement, and what one wants to do with it and forms the foundation of one's retirement lifestyle and occupations. The occupations section then proceeds to tease out the relationship between occupation, meaning, and happiness/satisfaction in more depth. From here, the social interactions section addresses social interactions as key to occupational choice and participation, which are in turn fundamental to meaningfulness and satisfaction. Throughout these sections, the crosscutting theme of personal choice and control is discussed.

1. Establishing retirement life

In this section I will highlight results that show how participants negotiated the differences between their envisioned life and the life they are living at the time of the interview.   Within the interviews conducted, a few subthemes emerged under the theme of *establishing retirement life.* These subthemes appeared to impact occupational choice as well as engagement in occupations and an individual's overall satisfaction with retirement including engagement in meaningful occupations. These subthemes are ideals, obligations, health, and finances. Some of these subthemes also address barriers to participation in meaningful occupation.

Ideal retirement outlook.

During the interviews it seemed that for some participants, the ideal of retirement was well defined while for others it was more nebulous. Tyler stated "I knew exactly what my weeks were going to be like, which appointments I had when and the times of the day when I had free time".   Danielle, on the other hand did not seem to have a

strong idea what retirement was going to be like for her, she commented "I thought I'd do more and be on the go all the time. I don't know what, but this is…boring". This gave rise to varying abilities to articulate what differences are present in current retirement lifestyle and idealized retirement lifestyle.

Some individuals were able to identify differences and a few even had ideas about how to surmount the differences. These participants felt like they were moving forward at their own pace, and if they were not living their ideal retirement (or engaging in corresponding occupations) at present then it would happen at a later date. Brian stated " …who knows; I may take up golf again. I'm not tuned into it right not but who knows next spring!" They spoke about seeing where life led them and that they would get to a more ideal retirement when the "time was right" (Ellen, Shannon, Brian). These participants, interestingly, were ones that had self-described themselves as being satisfied in retirement.

Those that were unable to identify ways to participate in their new or desired retirement occupations appeared to be at a loss for implementation, or problem solving as to how to go about getting involved. They were bewildered with regards to moving ahead and therefore appeared stagnant in their lifestyle, creating some discord between their reality of retirement and what they hoped it would be. Janice stated "I feel bad that I am not doing the things I wanted to be doing, like travelling with my husband, but I just can't. And I don't see it getting any better. I can't change things."   If they could determine ways to move ahead- get over the obstacles they perceived, then their engagement in their retirement life would not seem in such disharmony. These

participants included Tyler who stated he was satisfied in retirement and others who reported feeling dissatisfied in their retirement (Danielle, Janice).

However, for a couple of participants, identifying the differences in their current retirement reality and their ideal retirement was almost impossible. They instead were just being left with a sense of "I don't know but I didn't think it would be like this". Jocelyn stated "When you're working you look forward to retirement. But, now I don't know what to do. L.. I don't know where to start. It is lonely." These participants, being even unable to recognize what they wanted to do, were most definitely hampered in their ability to implement changes to their lifestyle to make it more pleasurable. They were rooted in their lifestyle, unable to move forward as they were not able to articulate what they would like to advance towards. These participants were ones who self-identified during the screening process as being not satisfied with retirement (Bonnie, Jocelyn).

Barriers influencing views on ideal retirement life.

Some participants had a vision of what they thought retirement would be like, however issues such as a lack of social connection or friends to do things with or health issues made their ideal retirement life look unattainable. For these participants, these barriers, anticipated or unanticipated prior to retirement, created situations in which they were unable to see ways to modify either the occupation they would like to participate in, or modify their idea of retirement to fit with their present situation. Tyler lamented " I don't know how I can go with the group if they do a walk out of the city; as I need to be so close to the hospital. I miss out on a lot.". Other variables, such as the fluid

changing of priorities in relation to the occupations of retired participants also impact engagement and how they feel about each occupation. This changing of occupational priorities post (and throughout) retirement also impacts how the retired participant views and feels about their idealized view of retirement and what their current lifestyle is like.

Occupational engagement in retirement life and its relationship with ideal retirement vision.

During the interviews, it became apparent that a number of participants were not participating in occupations they stated they would like to be doing. When asked, there were some reasons given for this discrepancy. One participant (Brian) spoke about wanting to take up painting. He stated with excitement in his voice

> Brian: One thing that I would really like to do A LOT, but I don't think I would be very good at is oil painting. ..So that is something I may try. I have a friend who does it and he finds real peace in it. I watch it on TV and I would like to try it
>
> Interviewer: So, why have you not signed up for a course or picked up a paintbrush?
>
> Brian: Because I told myself that I would take a year of time and do nothing, to just sit back, no stress, nothing... After I retired I had a year or so where I went right into the child care thing and so it was like another job. I am just waiting for my year now. I know exactly where I am going and who I am to talk to though. (Brian)

It appeared early on in the interview that Brian was motivated to not take on new occupations too quickly and to give himself time to relax after his working life. He stated

he had a plan for how to move past just contemplating occupations and into actually participating more. As the interview went on however, he appeared to be less at ease with undefined "relaxing" time. This was evident when he stated, "anything that wastes time bugs me, and that can range through anything. I don't like feeling that I am wasting my time" – thereby giving the impression that the unstructured relaxing time could be somewhat of a struggle for him. The transition from working in a high pressured job to finding retirement occupations which were of very meaningful and low stress appeared to be his ideal occupation in retirement life, but also was not what he was currently doing in his retirement. Brian displayed a strong conviction that he should be living his retirement life in a certain manner, with specific expectations, a timeline and plan. This appeared to mirror how he managed his working life. However, without the deadlines, external pressures and the requirements of running a company, this model he is following for his retirement life did not seem to be working for him in his retirement. He had his ideal pursuits but also a strong sense of what he felt he should be doing during this time (relaxing), yet his self-imposed year of relaxing did not seem to be gratifying for him. This dichotomy between his ideal retirement and his actual current lifestyle was not unique to his interview.

Bonnie stated in her interview that

Retirement isn't great. I don't want to work, but I thought retirement would be more fun. (prompt from interviewer: How so?) ... I just thought I would be doing more things. But it would have to be interesting things, not just any old things. I used to go to the casino to watch bands play but I haven't done that in a long time. I used to go with a friend and her husband, but we really don't see each other anymore.

Bonnie struggled with verbalizing more about her ideal retirement. Unlike Brian who clearly had ideas on what occupations he would like to do in retirement, Bonnie seemed to be at a loss for ideas of what to pursue in retirement. For Brian he knew he wanted to take up painting, however it was a conscious decision at this time for him not to pursue this interest. Bonnie's situation is very different. She was actually unable to identify occupations she would like to engage in, and therefore did not appear to have that same sense of control over her situation. Bonnie's decision was not to engage; she was unable to find an occupation she would like to pursue. Interestingly, the issue of personal choice and control impacted satisfaction for Bonnie. Bonnie did not feel in control in her retirement, or at least she did not feel like she was in control over participating in meaningful occupations. Without a sense of wanting to participate in a certain task, or directing when to engage in an occupation, her sense of personal choice and control is limited. Her low satisfaction with her lack of ability to define her ideal occupations (and with her overall retirement life) perhaps is indicative of a barrier to engagement as well.

Bonnie, though unable to identify occupations of interest, was able to articulate a number of discrepancies between her retirement life (what she was experiencing) and what she would like to be doing such as: doing more things with her husband, doing more activities during the daytime, having a social circle of individuals who she could do things with. Interestingly, Bonnie spoke about wanting to do more "activities or things" but she was unable to identify what things those may be. She could identify that she thought retirement would be different but could not identify any activities or steps to

move any closer to what she felt retirement would be more like. This was similar for Janice.

Janice had difficulty identifying occupations she wanted to engage in now that she was retired. Prior to her retiring, she had envisioned many occupations and had discussed this with her husband together making plans on what retirement life would be like. Janice, however, developed a medical condition which significantly changed her life, and required her to change her view on what retirement life would be for her and her family. There was a sense of loss of her ideal retirement and at the time of the interview she did not see how she would be able to do the things she envisioned prior to retiring. At this time, Janice was not able or willing to look at alternate methods to change the meaningful occupations from before to allow her to participate presently, accommodating for her new physical limitations. She was still grieving the loss of her (pre-retirement) retirement vision and she had yet to formulate a new vision, with new occupations and interests or new ways of participating in the original vision and its occupations.

Social Interaction and its influence on ideal retirement lifestyle.

This is not what I thought it would be like for me. For us. I thought we would be able to plan trips (travelling) and go to new places. I thought we would be active in the kids' swimming organization in a significant way- taking roles within the organization. I also thought we would have time to have a leisurely breakfast and coffee together in the mornings, where we would do things with friends and also spend more time maybe fixing up the house. ...we have great friends. I

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have great friends, and I get out every week to see them; but it is not the same. (Janice)

Janice stated she did have friends and social support that were important in her daily and now retirement life. This did not seem to be a missing factor in her retirement life. For others, however this was not the case. Bonnie alluded to not having friends to do things with which in turn limited her participation (Bonnie). She also stated

...maybe if (spouse) wasn't so busy or we did things together, that might make things better. If we could get someone to come in to stay with (father), but now we always do things alone. One of us stays home with father, and the other gets out. So, we don't get out together. If I had someone to do things with it would be better. I think I'd do more.

The importance of having social support was echoed in the interviews of others as well. Both Danielle and Jocelyn identified that they thought retirement would include more social activities and that if they had more social support and that they would be happier.

I do get out and do things I enjoy, but I don't like always being on my own. There are most things that I just go out and do, but sometimes I decide not to go because I would have to go on my own. Having someone to talk to, share things with and bounce ideas off would make some things more enjoyable. Also, I just miss having a friend to do things with so sometimes it is easier to stay home. That's not what I thought I would be doing. (Danielle)

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I thought I'd be going to see the world now- especially now where I can still see and walk. I would like to be on the go now as when I do have health problems then perhaps all that would stop. It is too bad when you have the time, you don't have the money or friends to go do things with. ...I am just so frustrated at home. It's lonely and you don't see anybody. It would be nice to have someone to do things with not just talk on the phone. We'd be on the go all the time. (Jocelyn)

These women identified that having someone to do things with would not only get them engaged in more activities, but would also get them closer to the type of lifestyle they thought retirement would offer. They both spoke about increasing their social activities and for Jocelyn at least she identified travelling and getting out in her community for activities as things she thought she would be doing and wanted to do. These findings led to identification of a separate theme of social interaction, which will be addressed in more detail in a later section.

Changing priorities and their effects on ideals in retirement.

A number of other participants spoke about occupations they were currently engaged in, but differences arose between what they were doing and what they stated that they wanted to be doing. Jocelyn spoke about wanting to relax in retirement, however also would talk about wanting to travel and volunteer. Often, there would be no underlying barrier to participation that could be identified but rather a lack of ability to implement a desired activity. Shannon talked about this when she was discussing travel and volunteering. She stated:

I think I hold myself back. I`ve just got to say that I am going to do something

and do it. I`m my own worst enemy. (Shannon)

One reason for lack of involvement could be decreased internal motivation but it could

also be a reference as to how she wanted to see herself occupied in retirement life.

She was not ready to begin to pursue her ideal lifestyle and occupations, and that lack

of readiness was holding her back from living the retired life she thought she would

have.

Well, now I just haven't done it yet. I've got to get beyond that (the transitions of

husband retiring, post child care obligations) and start doing stuff. I don`t know

what is stopping me other than just me. (Shannon)

When asked whether her lack of participating in an activity was a motivation or

implementation issue she was unable to identify the cause. In her interview, she spoke

numerous times about her own shifting of priorities and therefore changing of

occupations since retirement. She described a change in what she felt was important to

do around the house (dusting and vacuuming for example) and how the importance of

that has changed for her which influences what occupations she chooses to engage.

Shannon acknowledged that in other stages of her life, more specifically when her

daughter was home and growing up, that cooking meals, baking and keeping a tidy

home were much more important than those things are now. She even went on to say

that she not only does not find those occupations a priority now; but that she actively

chooses to not engage in those occupations.

Ya, I just don't like doing that anymore. I don't know if it is years and

years of doing it and you just get tired of it. And, when it is only two

people it is harder too. I just don't like that anymore so we go out to eat

and I have someone come and clean the house very month or so.

(Shannon)

When a significant change occurs in a person's life, such as retirement,

then roles, responsibilities, schedules and occupations have the opportunity to be

affected. As priorities change so too can involvement in various occupations.

Priorities change according to the new lifestyle and demands placed on an individual

and this may be in line with what an individual envisioned life to be like, or it could be

very different. This shift of priorities seemed to be continuing for Shannon at the time

of the interview perhaps thereby limiting her implementation of new activities. These

new activities, if participated in, could bring an individual's lifestyle closer to what was

envisioned preretirement. A change in priorities seems to be a catalyst or part of the

transition from the current to ideal occupations, if it happens at all for a participant.

Some participants can, even with a change in lifestyle, get into a situation

where they do not know how to go about implementing new occupations, routines or

opportunities into their daily lifestyle. For Jocelyn, it appears that this is the case. The

change in priorities is one part of the transition, but the desire or motivation is

important too. These participants may in fact continue to live with the discrepancy

between ideal and actual lifestyle, potentially leading to a decrease in overall

satisfaction in retirement life. Living a life different from an idealized one may lead to

feelings of decreased happiness or satisfaction. However, on the other hand,

depending upon a participant's priorities the difference may be looked upon as more of

a journey and met with more patience and tolerance, as evidenced in Ellen's interview. The journey may have periods where an individual might feel grounded or stuck, but in fact this might be transitory. This period might be part of the transition process and with time and effort (a re-evaluation of priorities, utilizing personal choices and making adaptations) this also can progress and change.

Ellen spoke about various occupations that she was not currently participating in but would like to be, but in contrast to Jocelyn had a much more relaxed outlook about the discrepancy. She felt that in her retirement life her changing priorities would naturally evolve and present her with the opportunities of pursuing identified activities. She was able to identify numerous occupations one of which was writing of a book she began while she was still working. The subject of the book was very complex and had strong emotional subject material. Ellen was also enjoying less stress and emotional investment in activities since retirement so she was not too concerned with her shifting involvement in activities and interests. Throughout her interview, she gave the impression that she welcomed the shifting or evolving activities and was interested in "seeing where life led her".

I think I am using my energy in different ways these days...I realized you know that what I am doing now I won't always be doing but I think that life will still continue to evolve and you just have to evolve with it. (Ellen)

Another aspect of establishing a participant's retirement life was the motivation behind engaging in current versus ideal occupations. For some participants, the reason for engaging in an occupation was based less on choice than on responsibility to others

or themselves. This sense of responsibility was discussed in terms of obligations that participants felt were present in their retirement.

Obligations.

For a few of the participants' occupations that they were engaging in were grounded in a strong, meaningful desire to participate, however they also inferred a feeling of obligation. All three of these participants were caring for family members (grandchildren and a father). Throughout the interview they conveyed feelings of love for their family member; however, it also seemed that a great deal of responsibility impacted the continued engagement in the occupation.   These individuals did not identify this occupation as one that they had planned for during retirement. They spoke about this occupation as coming up post retirement and seeming to take over their retirement life. The act of caregiving brought a very structured schedule for these individuals, with copious amounts of their time being involved. Caregiving limited what the participants were able to do in their day as they were now expected to be at a particular location for a large part of their day, and caregiving took quite a bit of their energy. This limited what they were able to do, and what occupations they could engage in, during what was left of their day.

The engagement in caregiving also affected the roles that the participants took on, and the relationships with the family members involved.

I felt like we had to be there but I also felt like we didn't have a choice which

didn't sit well with me. I felt not appreciated because they took us for granted

being there with them all the time. I didn't want to do that; I wanted to be

grandma where you could just spoil them and not have to discipline. (Shannon)

We have been committed to the kids here. We worry about them. You know I

am the one left holding the bag. You know I am the one supporting her more

than anyone else. (Brian)

...They are my grandkids and I love them dearly, but we were with them every

day.... And it wasn't enjoyable; it was stressful to be honest with you. (Brian)

These two participants talked about the role of caregiving and the role of being a

grandparent. They expressed wanting to be the grandparent and not wanting to be the

caregiver, feeling trapped and obligated to be in the caregiving role. They articulated

their frustration and resentment in this, but continued to engage in this occupation out of

love for their daughter and her children. For these two participants being caregivers

truly took over their daytimes and limited what they were able to do. Volunteering,

taking up hobbies and even travelling were impossible due to their responsibility to look

after their grandchildren every day. Obligatory occupations for these two participants

shaped their retirement life during this time and obviously in ways they did not want it to.

They felt like they really had no choice in whether or not to engage in child caregiving

which will be addressed in more detail later in this chapter.

Obligations also extended towards more senior family members, not just to

grandchildren. One participant, Bonnie, was looking after a parent. She engaged in the

caregiving role out of love for her father, but also out of a sense of obligation for all that

he did for her when she was growing up. Her father had special needs now and therefore she required much time and energy for this task. Like the other caregiving participants, she was quick to point out that she loved her father and recognized the importance of spending this time with him, but was also aware of the toll it is taking on her and her retirement life.

> ...Obviously helping out (father) or being with him is important to me. And also being with the rest of my family is too. He does take a lot of time and energy... It's good... it can be okay; but it is exhausting. I wouldn't say it is fun though. He can be a handful and I think I need more time away. I want to do other things too. (Bonnie)

Even as Bonnie talked about looking after her father in the above statement it was easy to see the conflict within her for this occupation. She started off saying in one sentence that being a caregiver was good, but then after a pause and self-reflection stated it was okay. After another moment she stated she needed more time, showing how even though this was a meaningful and important occupation to her, she was still finding it difficult. She appeared reluctant at first to talk about her feelings of needing to get away more, instead simply making a blanket statement of caregiving being good. This statement shows how she wanted to do this work and also felt badly taking about her own needs or wishes. This sense of obligation, or perhaps duty, certainly shaped her retirement life and the choices she made for occupations.

Another type of obligation can include an occupation undertaken for oneself but seen as a burden. Tyler had numerous medical appointments he needed to attend and although he understood the importance of them, he felt his days had to be structured

around these times. He identified his appointments as being a "full time job" for him.

Tyler spoke with great emotion about going for appointments and travelling to the

hospital as not just a health issue but an obligation. He wanted to do it for the positive

(health related) outcome, but the emotions of frustration and the sense responsibility (to

himself) to go to these appointments made it feel more obligatory than a choice. He

stated that

> ... I have to go to doctor appointments all the time. It seems like I am there
>
> every day, but in fact it is usually a few times a week. It is a disruption for sure
>
> in my life, even though I know it is completely necessary. It takes SO long too.
>
> Going to the appointment, then waiting to see someone. It is consuming and I
>
> hate it. But, I know I have to go- I just resent it. (Tyler)

Tyler spoke about the medical appointments as a necessity and a hardship for

him, as well as being inconvenient and taking up copious amounts of time in his week.

It however also put a constraint on other occupations he was able to engage in

throughout the day, week or month. The same limitations the caregiving grandparents

felt Tyler also echoed. He explained that he was unable to join some groups as he

would be unable to commit for the necessary times; he could not travel as he was

limited by his trice weekly appointments to the clinic nor did he feel he had the time or

ability to take up new activities. Unlike the other participants who described feelings of

obligation towards certain roles and/or occupations, Tyler's obligation was towards

himself and remaining healthy. This, however did not decrease the feelings of

resentment he had for the obligatory task. Most certainly the obligation of medical

appointments had a significant impact upon his retirement life and his ability to establish

routines and occupations in accordance to his interests, values and opportunities available to him.

Health and its relationship with establishing retirement life.

The health of individuals and the impact it has on a retired person's ability to establish retirement life was evident for a number of participants. A change in medical status, particularly a change that is long term appeared in this study to impact a participant's ability to participate in retirement life as they would like, as well as impacting on their level of satisfaction in retirement. For two out of the four participants interviewed who described themselves as being less satisfied with their retirement life, medical issues limited what occupations they could engage in. For these participants, retirement was necessary due to their medical condition, forcing retirement onto them perhaps before they were financially, emotionally and cognitively ready for the transition. The health changes for these participants limited their ability to engage, mobilize and participate in daily life as they had before, both in their work and their leisure pursuits. Physical limitations to mobility as well as endurance and the ability to participate in the activity as before (due to decreased vision, proprioception, and/or sensation) combined to restrict occupations for these participants. These participants then were unable to participate in various significant/meaningful leisure activities as well as some aspects of their respective jobs. In time as their health issues progressed retirement became a necessity they had to embrace and not a personal choice at that time in their lives.

As my eyesight started failing I was given more tasks that were computer based. I had a large screen on the computer, but as time went on I started seeing less

and less until I couldn't see anymore. I suppose we could have looked at voice

recognition software, but there were less and less things that I could actually do

in my job. Finally, there just wasn't enough that I could do and have everyone be

safe, so I just retired. It was so hard. I didn't want to retire. (Janice)

Janice was working as a pharmacist when she began losing her vision. She

described modifying her duties on the job to use capitalize on her remaining eyesight for

tasks that could be done on computer. At the same time she also had to give up driving

which then limited her sense of independence. Eventually, with the progressive nature

of her illness she was forced to retire and give up gardening, needlework, skiing, and

scrapbooking. She felt a sense of loss when she retired, and as she stated above,

although it was the safest option for the patients she did not want to retire. A loss of her

paid employment came at the same time that her meaningful leisure pursuits were also

being given up, not from personal choice but due to her health issues. The same could

be said of Danielle who was working as a receptionist when her health problems began.

... The chemo made my hands feel numb and I was always afraid I was going to

drop things. I couldn't tell where my feet were so I had to look at the ground

when I walked. I was so exhausted all the time, even after all the treatments

were finished. Where the cancer was it became harder and harder to walk or

even sit at times. I knew I could not function in my job so I never went back. I

just sat around all day feeling sorry for myself about it all. (Danielle)

Danielle also self-identified as being not satisfied with retirement. She spoke

about the factors involved which led to her retirement and how she felt she had no real

choice in the matter. Even though Danielle was still able to engage in some of her

meaningful occupations such as bridge and socializing with friends, these activities required modifications due to her medical condition. She also found this frustrating as stated below:

> I hate that I can't play bridge for as long as I want. Everything seems to be controlled by my health. It determines how long I can sit, how often I can play in a week, and even where I can go- depending on the chairs and how far away it is. I want to be able to go as I please and not have to worry about how I am going to feel or if I can do it. (Danielle)

With the loss of a sense of choice, or control, even activities that she found meaningful required more effort. She spoke about the barriers of needing to sit on hard chairs, length of vehicle ride to get to a venue as her barriers put in place from her medical issues.

Tyler's medical issues began impacting what he was able to do and not do after he stopped working. Tyler identified himself as being satisfied; however he still experienced many of the same limitations that the other two participants with medical issues faced. However, he retired on his own terms and after achieving the goals he had set out for himself. At the same time, he did express much frustration over the impact his health had on his retirement lifestyle and the occupations he was able to engage in. He stated his decreased endurance limited certain leisure occupations (sports) he could participate in and the frustration he experienced if he did try to participate- the health ramifications he endured for days afterwards. Also, he expressed that his health requirements, endurance and lengthy time in medical facilities limited the available time he had to participate in occupations.

There are lots of things I can't do anymore. I can't go to my walking club because I can't do the trails anymore. Even the really easy ones on paths have me laid up for almost a week after. Even if I tried I don't have the strength to do it. I've become weak sitting around all day. To be honest, I don't want to be too far from the hospital in case I need it, so I really can't go out with the group. I was one of the ones that started the group here. It has grown so much since then. I don't like getting older. (Tyler).

Even though Tyler made a choice to retire, and perhaps this contributed to his feelings of satisfaction in retirement, he still expressed frustration and disappointment with his health and the limitations it put on his occupations in retirement. In the statement above Tyler indicated he had some acceptance (or control) in the situation when he admits that he doesn't want to be too far from medical attention which also then means he would choose to not leave the city to go on the walks/hikes. That sense of control over the situation was not evident in the women's statements discussed previously. Both Janice and Danielle spoke about their situations with an external locus of control differing from Tyler's outlook of having more choice. Without knowing these participants prior to their retirement it is impossible to understand what their pre-retirement personality was like. Whether the internal locus of control vs the external locus is simply a personality issue or a function of their health circumstance, it does seem to impact how each of these individuals see retirement life and how they are reacting to their health issues. All of these participants have significant health issues which impact their lives. They have spoken about retirement in terms of what they have had to give up or have lost. They all had professional jobs and had been retired for

more than 5 years, yet they seemed to approach their retirement differently. While health issues impact a participant's life significantly, there appear to be other factors which are also involved when looking at the impact health has on a person post retirement.

Finances and retirement.

Wealth and income limitations can impact occupations the individual can engage in which also effects a person's overall outlook and satisfaction in retirement.   Being retired, an individual is relying on the money secured prior to retirement and any government assistance so their feelings of control or choice in this area may be limited. The quotes below seem to address the feelings of two of the participants with respect to financial concerns.

> I think I am really limited because of money. It is really difficult right now to try and stretch your cheque to cover heating oil to gas to toothpaste and the dentist and your pills. I know you are supposed to have certain percentages for shelter, food and medicine, but there never seems to be any left over for anything else. It is stressful. I think you start worrying, and the stress around money can make you feel sick. It certainly keeps you from being happy. (Jocelyn)

> Being on a pension you are limiting yourself to what you can buy or do. With only a certain number of dollars to go to a senior then you are lucky if you can buy your medications and pay your rent. You don't have that extra money to do stuff. (Jocelyn)

> If it has a cost to it then I wouldn't do it. I don't think I could do anything really that would cost money.   (Bonnie)

It should be acknowledged however that during the interviews of these two individuals they were unable to identify more than one activity that they would like to engage in that they were not presently doing. These two individuals were very vocal about how money was limiting their occupational participation. However, Bonnie could not articulate any activity she wanted to do that was limited by her financial situation and Jocelyn was only able to identify travelling. Finances could most certainly be a barrier but it appears that it is closely linked with the other variables such as health, social support and obligations.

Interestingly, the majority of participants in the study did not identify finances as barriers to participation in occupations. This could have been due to the population of individuals who volunteered to participate in the study. Most of the study participants held professional positions prior to retirement and coupled with the fact that there is/was a high standard of living in Calgary during their working years thus their wages would have reflected this. Also, within the health care and private sector in Calgary there are organizations who work with the older adult population offering support, information and resources, therefore there may be more opportunities for assistance. This may or may not have been the case if this study had been completed elsewhere or during a different period of time. Also, at the time of the study Alberta had a pension supplement for low income pensioners which resulted in monetary increases to those pensioners most in need financially. This may not be available in other provinces in Canada which could impact pensioners responses if this study had been completed elsewhere nationally.

No matter where or when an individual retires, they must create a life or structure to guide their occupational and daily activities. The establishment of a retirement life is

influenced by an individual's ideals, obligations, health and finances which together form retirement life for the individual. Satisfaction shaped by the presence or absence of personal choice can contribute to facilitators or barriers to participation in occupations. Occupations are important to all those interviewed as they are a measure of what the person is doing and the meaning or importance that they place on what they are doing.

2. Occupations

Because the interview guide used for this research focused heavily on occupations, a great volume of data was collected that related to this theme. Initially I examined the purpose of occupations using the classifications of self care, productivity and leisure as described by Townsend and Polatajko (Townsend & Polatajko, 2007) as a way of exploring the range and themes of occupations, hoping that this would lead to an exploration of meaning of these occupations and their barriers and facilitators. All participants could identify a number of occupations they engaged in that they felt were meaningful in some way. The amount of occupations identified ranged greatly from a high of sixteen to a low of six. The range of occupations identified encompassed self-care, leisure and productivity. These included ones that are traditionally identified as self-care (i.e. brushing teeth, showering/bathing) as well as ones that were being engaged in to regulate their mental health such as …

> I really like to go for my morning walk. It is more than like though; I need to go for my walk or I don't feel good. Getting outside, walking my loop I need to do it every day. It is my morning routine I get up, brush my teeth, go for my walk and then I am ready to start my day. (Ellen)

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Leisure occupations were identified as occupations engaged in purely for enjoyment and included activities such as knitting, reading, golf, and travelling. Productive occupations included those which had an element of responsibility attached to them to distinguish them from activities engaged in purely for enjoyment. Examples of productive occupations that were identified included casual paid employment, volunteering and care giving. It was also recognized that for some, the classification of occupations overlapped.

> I am quite a good bridge player and am on a couple of teams that we`ve been together for years. We play well together and I make an effort to never schedule appointments during bridge times as my team counts on me. (Danielle)

For Danielle playing bridge was a leisure occupations as she played out of a love of the game, but recognized she had a responsibility to her team she played on. Similarly, Shannon volunteers at her granddaughter's school but truly enjoys every minute she is there.

> I am volunteering at the school. I really enjoy that. Really enjoy that. Just to see how the teachers interact with and how my grandchildren interact with them and their friends. And to really feel a part of the school. Yes, I really enjoy it. (Shannon)

When exploring the occupations each participant engaged in, it was interesting to note that those who identified themselves as being satisfied with retirement were not the ones with the highest numbers of identified occupations (see Table 2). In fact, the participants who could identify the most occupations were evenly divided across the two groups of satisfied and not satisfied. Also, the ones who identified the lowest numbers

were also evenly split between those who were satisfied and those who felt they were less satisfied in their retirement occupations.

Table 2. Participant Identified Occupations

Participant	Satisfaction with retirement	Number of identified occupations	Identified meaningful occupations
Brian	Yes	9	3
Ellen	Yes	14	3
Shannon	Yes	16	6
Tyler	Yes	6	3
Bonnie	No	7	2
Danielle	No	12	3
Janice	No	11	4
Jocelyn	No	7	3

It appeared that the data was showing that more complex factors than simply the number of occupations (including meaningful occupations) engaged in influenced individuals and their satisfaction with retirement.

Occupations and meaning.

When asked to comment on occupations that were most meaningful, participants identified, on average three occupations, although one participant identified six and another identified two occupations. The meaningfulness of an occupation was attributed by the participant without any direction from the interviewer. Participants may have various ways to define meaningfulness, however everyone was able to identify occupations that were significant to them. For example, one participant, Ellen, spoke

about occupations that she described as ones that "mattered" and that participating in certain occupations in her life as "mattering." She described the occupations she felt were significant as being fluid, and ones that she felt vital to engage in.

I really want to make the most out of each day. And I want to fill each day with things (occupations) that are significant.... mattering is still important to me that I am doing something that matters. Whether it is giving of myself in any shape or form to what I am doing or doing it to the best I can. Mattering is what is important to me. That's it. Very simple. I do what matters to me and I am happy (Ellen).

Only one occupation was universally identified across all interviews as being meaningful and it was being around/socializing with family.

Being with (my family) is the most important thing about my day. I can`t imagine my life if I was unable to be around them. I would be just so depressed. I like them. And not just because they are my family. I don't have much else."(Bonnie)

Being with my family is the only thing I really need to have in my day. Being with them is all that really matters in the end. (Danielle)

The most important things for me to do would be to do something with the kids. Not just spend time, but do something. Make memories. Enjoy the moment. (Julie)

I like to spend time with my kids and grandkids. I would say the role of mother changes as their children are adult changes, but maybe I am just so incredibly fortunate that they still want me in their lives. I would say they are the most important part of mine. (Ellen)

Family. Family. Family. That's it. My daughter and my son and his family. Oh, and my dogs. That's what is important for me. (Tyler)

Other meaningful occupations, particularly physical occupations, were identified, even though on average there were only a few of those named.

Keeping active and fit means a lot to me. I think it is so important for my overall health and I may not do a lot of things in my day but I make sure I walk or play golf or even do a class with Living Well twice a week. I make sure I find time every day. (Tyler)

I think you start to get sick because you start worrying, the stress... and you don't have structure to keep yourself going (when retired) so you need to stay healthy. Walk, get outside and get some exercise. Mow the lawn. Something. Your health depends on your happiness and your happiness depends on your health so you'd better get active to stay healthy. (Jocelyn)

There was a subjective difference noted during the interview process in that the participants who reported being satisfied with retirement were able to more easily identify meaningful occupations. The participants reporting less satisfaction with retirement appeared to have a more difficult time identifying meaningful occupations. This was evidenced by a longer time taken to respond as compared to the more satisfied group.

It seemed that participants were more likely to engage in occupations as a result of the meaningfulness they derived from the occupation than out of a quest for a balanced lifestyle (at least, balance defined by a variety of productive, leisure and self-care occupations). It was not the number of occupations, but what they represented to

the individual that was important and ultimately led to an participant's engagement in occupations. Due to this finding coming out of the interviews, I decided to look more closely at the aspects of meaning and satisfaction, and to move away from analyzing the various categories of occupations.

Meaning and satisfaction.

When considering the occupations identified as meaningful a significant distinction arose from the interviews. For most participants engaging in meaningful occupations brought pleasure, happiness and satisfaction to their lives. This was evidenced by responses given to a question asking how they would feel if they were unable to continue to participate in the identified meaningful occupations. Some responses were:

I think I would become very sick. Depressed. I don't know what I'd do. (Jocelyn)

These are the highlights of my day. Take those away and my world becomes dark. (Janice).

I am not sure how I would cope. If I could cope. I would need to find a way to do (the activity) it is what keeps me going and happy. (Tyler).

A few participants described engaging in an occupation that was meaningful however not entirely pleasurable and satisfying as described in the previous section about obligations. In all instances discussed the occupation was caregiving and the individuals spoke about wanting to provide care (for grandchildren or an aging parent) and how deeply meaningful it was to them, however it also came with a sense of

obligation as well. Still other participants were unable to participate in the occupations they feel are satisfying because they have these meaningful but obligatory occupations. These occupations take their time and energy leaving the without an opportunity to participate in other, more satisfying occupations.

Context is important to both meaning and satisfaction. In the context of establishing retirement life, occupations take on different meanings which leads the participant to feel the occupation is less or more satisfying. Knowing how the person feels about an occupation can provide invaluable insight into any deeper meanings they may have attached to that occupation. The same occupation can have various feelings associated with it, it even for the same participant. The meaning of an occupation can change over time or through circumstances. For instance, in the quote below Shannon describes an occupation that if she did not feel an obligation to complete would elicit a very different feeling.

I think the problem was we were doing it all the time and they got so that we were just like their parents. They wouldn't listen and they would fight with each other and us. I didn't want to be the daily disciplinarian. I did that already with my daughter years ago. It was my turn to be grandma. You know we did it to help them out. We did it because they're our grandkids for sure and other things didn't work out. I wanted them to be happy. But I just didn't like the feeling of having to do it. I resented that, really. (Shannon)

Barriers to satisfaction with occupation were seen as being closely related to barriers with satisfaction in retirement. Some of the barriers, as discussed previously, are that participants are unable to determine what it is they need to do to enact their

potentially satisfying occupations. The barrier could have been an participant being

unable to identify satisfying occupations. Or, it could have to do with health issues of

which the participants unable to problem solve through as to how to change their

participation to allow for engagement; or how to financially be able to participate. All

those reasons could present as barriers to participate, and/or feelings of satisfaction

with the occupation.

3. Social interactions

Social interaction, as a whole, showed a decrease in both the satisfied and less

satisfied groups of participants as compared to pre-retirement interactions. All the

participants interviewed were employed outside the home and had to leave their home

to go to work. They all had various jobs including: oil company executive, nurse,

teacher, pharmacist, hospital chaplain, insurance agent, oil patch engineer, and a

receptionist so they were all working in a setting with others. The amount of decrease

in social interaction was varied, and how they felt about it also varied, between

individuals and groups.

For some participants, the decrease in social interaction was welcomed, even

planned. Brian spoke about a conscious decision, made before retirement to let himself

transition from living in the worker role for so many years, into a retiree role.

...I told myself that I would take a year of time and do nothing, to just sit back and

no stress, nothing, maybe keep in touch with my old boss and that sort of thing.

When I came down from my emotional high from retiring, and all that then I would

start looking at what I wanted to do. But until then I would stay home, relax and take it easy. (Brian)

The retirement lifestyle did not keep him inside the house and away from people, but he spoke about going out and socializing on his terms or not socializing at all on occasion. During his work years he worked in an executive role of 3000 individuals and engaged in expected social dinners, golf games, retreats as part of that role. He stated "I want to decompress from the stress. It is my time to decide what I want to do with it." This sentiment was echoed by another participant when she stated:

After I retired, I was extremely involved in the community and volunteering. It seemed to fit, almost as an extension of my role when I was working. But, I was over involved really, in everything. You know I was volunteering here and there ... and then last year I stepped back from it all because I was getting so tired. So, although I support my church in any way I can, its mostly my friends I go out and support if I can now. ...Perhaps when I think back I think that when I was working so intensely with people that I felt at the time [retirement] I needed to get myself an opportunity to just back away, be quiet and learn who I am as a person again. (Ellen)

For both of these participants during their transition into retirement they made the choice to remove themselves from the level of social interaction they were engaging in previous to retirement. They spoke about this decision with a sense of purpose and with positivity, having a clear vision of what they wanted their social commitments to look like.

For others, the decrease in social interaction was described with negativity and wistfulness. Again, there were varying degrees of amount of social interaction, but there was a sense that they would have liked more. One participant, Danielle, was able to identify a number of occupations she participated in on a weekly basis. She described herself as being busy and getting out into the community, but she felt that she would be more engaged and active if she had someone else to participate with. For her, she felt somewhat in control and directing her activities, however seemed to lack the purpose and positivity of the others above.

> I do keep myself busy. I am a reasonably good bridge player, I usually play 3 afternoons a week and I can pick up other games if I want. I will take myself out to the movies, or go for a drive out to Canmore or simply go out for brunch. But it is by myself so it is not as often as I would like – or as it was before (I retired). (Danielle)

Those participants who felt that they did not choose the level of social interaction they are currently experiencing, stated less positive feelings and appeared less satisfied overall. The tone of their interviews included more prompting from the interviewer and had less enthusiasm in their answers. There was a tone of loneliness in some of the interviews, as in the quote below:

> If you`re working you always have your evenings to do the work around the house.  During the day you`re out with people and you are doing your jobs and when you come home, you`re all hyped up, you`ve got housework to do. You`re probably going to make something to eat and everything, but....  I`m really depressed over having to stay home, having nothing to do, not seeing people it is

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just.... If you are out with people you are smiling, you forget your problems back

home. It is a great feeling to be out with others. I can go a whole day now

without getting dressed if I want as I don`t go out. (Jocelyn)

Some participants had strategies in place to assist them in increasing their social

opportunities. In contrast to the individuals who chose to limit their social interactions,

at least one participant, Janice, spoke about ways she tried to ensure she remained

engaged with her larger community.

I try to get out as much as I can, but it is hard. I go out with a friend once a week

for groceries- it is just as much of an opportunity to get out and socialize as it is to

get food. I just want to get away from the house. (Janice)

Later on in the interview, she continued with her explanation on increasing her

social interactions

My husband and I go out to eat once a week. I also have good friends that help

out and will come and pick me up, but I don`t like to ask them all the time. I like

to eat out so we have one night a week set aside and we always make an effort

to go out for dinner. (Janice)

The reasons for the decrease in social interactions were varied and led to

differing outlooks and ways of coping. The participants who chose to limit their social

interactions, or decrease them, were more positive and overall described themselves to

be satisfied in retirement. The others, who felt they would prefer to have more social

interactions, or that limited interactions were not a conscious choice they made,

identified themselves as less satisfied in retirement during the screening process. The

differences in outlook of the participants highlight the difference between social isolation

and loneliness. An individual can be quite socially isolated and feel very comfortable and content with the level of limited social interaction. Conversely, an individual who wants more social interaction then they are having, they may not feel content and may feel lonely and sad. Thus, being socially isolated and being lonely can be different notions. Jocelyn articulated this when she stated

> I am lonely. When you don't see anybody and if you are depressed it makes it even worse. Even knowing you had somewhere to go or something to do would make a difference. You would have a reason to go out. And you would see people. You might not know 9/10s of the people you see but you put a smile on your face and you have a reason to be there. It's like then you are a different person and you are smiling, you are happy and you are talking to everybody.   If I wanted to be home by myself and away from people it would be different. But, I don't. (Jocelyn)

In thinking about social interaction, it became apparent it can be thought of in positive or a less positive component. It emerged as an important theme, but it is not simply a barrier or a facilitator—it impacts both what people do and how it makes them feel. Social interaction can be viewed as desirable to some individuals and yet unwelcome for others. Some participants really wanted social interaction with others and may base occupations around others being available. Others felt that the social interaction circumstances lead to more obligatory types of occupations which they did not want at this stage. Thus, a factor can be a facilitator for some and a potential barrier for others when looking at engagement in occupations; and this can be influenced by what they feel is within their control, or choice.

Summary

In summary, the transition from paid employment to retirement was not necessarily the only transition that the participants to navigate. They also had a vision of their ideal retirement that they might or might not be living at time they were interviewed. The transition, or pursuit, towards their ideal retirement life was also affected by their sense of satisfaction and personal choice.

Retirement is a transition which participants embarked upon in different ways. Some individuals were able to choose and direct their retirement while others may begin retirement feeling as though they were forced to retire. The crosscutting theme of personal choice and its interaction with other themes had a huge impact upon participants' satisfaction in occupational and overall retirement life. Engaging in meaningful activities that are satisfying and voluntary was instrumental to establishing a retirement life that is consistent with the one envisioned by the retiree. Other influences, such as obligations, social interactions, health and finances play a role and can be barriers to an individual finding satisfaction with occupations and retirement life.

Chapter 5

Discussion

Retirement has been a topic in the literature for many years in preparation for the aging population. There is less research exploring the concept of how an individual structures his/her retirement life, acknowledging the various factors impacting the activities in which one engages.   Engagement in occupations is a result of a wide array of factors, as individual as each person themselves. This section will explore the issues surrounding personal choice, transition to retirement and meaning and satisfaction as they relate to the retired individuals who participated in this study.

The idea that engagement in meaningful activities would lead to, or equate with, satisfaction in retirement was an assumption in this study's design. It was assumed that those who are not satisfied with retirement would be participating in occupations which are not meaningful to them and by identifying barriers one could then work towards removing those barriers. Potential barriers that were suspected of having an influence were health (physical and emotional), finances, marital status (looked at for issues surrounding social isolation), community opportunities, physical barriers and transportation. It was anticipated that if similar barriers were present across a number of the interviews then these themes could help direct questioning and guide OT intervention in the future for individuals who report similar circumstances or concerns. Factors of health issues, social isolation and finances were hypothesized to be important in this regard.

In this study, I found that personal choice, transition into retirement and meaning and satisfaction were the key messages which emerged from the analysis across all themes. Each of these key messages influenced the individual's participation in occupations and the overall satisfaction with their retirement. This chapter will explore each of these messages and their interconnectedness with each other and with retirement lifestyle.

Personal Choice

The issue of personal choice emerged as an essential aspect to the participating individuals when looking at their lifestyle and the occupations within which they engaged throughout this study.   CAOT in 2002 acknowledged the role choice has for an individual in deciding to engage in an occupation when they included it as one of the eleven features of an occupation, explaining further that "People can express choice by deciding whether to continue, change or stop what they are doing" (p.37).   In this study, when participants were able to freely decide on an occupation they reported more overall satisfaction with their engagement in occupations. This echoes Laliberte Rudman et al, (1997) finding that when individuals were presented with an opportunity to exert their free will and values into the occupations within which they engage their overall sense of well-being, including satisfaction, increased. The study reported that not only were positive contributions to the lives of the participants identified due to an individual's ability to exhibit personal choice over an occupation, but that the persons implemented strategies to ensure this control could be maintained in the future (Laliberte Rudman et al., 1997).

The concept of personal choice or control was supported by this current study. The individuals interviewed who identified themselves as not satisfied with retirement described instances where they felt they had no control over aspects of their lives- even right back to the timing of their retirement. Some individuals felt that retirement itself was not their choice but a necessity due to external factors such as a medical condition progressing, or a retirement mandated by their profession. This sets up retirement life in such a way that the individual feels they had no choice in their retiring and may lead to a lower degree of satisfaction with their lives. In this study, all participants in the not satisfied group felt like their retirement was not a personal choice. In contrast, all those in the satisfied with retirement group spoke about their ability to decide for themselves when to retire. Shapiro &Yarborough-Hayes in 2008 also supported this concept having reported that while researching men's mental health they determined that personal control (or choice) along with autonomy featured predominately in the mental of health of retirees and that the involuntary nature of retirement has a negative effect on health. Shapiro &Yarborough-Hayes (2008) reported the following:

> If retirement is a desired transition and if it favorably compares to working, the transition is very likely to be health promoting. However, and unanticipated retirement, especially one that is the result of health problems, is associated with further adverse effects on health. (p.52)

Furthering that thought, if an individual is engaging in occupations they choose then they are more likely to be satisfied with their participation, and therefore more content with their daily routines and have less risk of negative feelings towards their life overall. CAOT (2002) states "Seniors also need opportunities to choose occupations

which are within their capabilities and resources, which give meaning to their lives." (p.19).

Those who have less choice may feel less satisfied, less content and more at risk for negative mental health. The literature has shown that a person's mental health influences their physical heath (Bailey & McLaren, 2005; Doshi et al, 2008; Kim & Moen, 2002) and therefore having less choice in a person's occupation may lead to an increase in negative mental and physical health.

Throughout the study, participants who reported feeling satisfied with retirement spoke about choice in the occupations they engaged in and being empowered when they were able to freely decide. Some participants engaged in meaningful occupations but had little choice in pursuing them, which led to a low degree of satisfaction in retirement. This is important for occupational therapists to consider when working with individuals. The recognition of the impact engaging in occupations that are not freely chosen can have on the satisfaction, and even long term mental health of a person, can be an important piece of the therapeutic partnership. Occupational therapists might become involved with clients who have few choices for a number of reasons. Therapists need to ensure that they assist their clients with monitoring occupations for adequate balance and enough choice so they are able to achieve a quality of life that is satisfying. Occupational therapists can assist clients by helping them create a plan on how to achieve the retirement life they feel would be satisfying. We can help them to make goals that can be achieved through short term steps that continue towards meeting their long-term goals. Therapists can also assist in trying to reframe the client's thinking to increase their satisfaction with present retirement life and occupations while

they are making changes and transitioning into their idealized retirement. By recognizing the aspect of choice, and its impact on satisfaction, we can assist others by illuminating how they can build choice into their occupations.

The literature supports having choice in occupations as part of occupational justice. Standnyk in 2008 explored the issue of an individual's occupational rights and the right one has regarding the quality of participation in occupations (p.448). She quotes Townsend and Wilcox (2004) and describes four occupational rights where one is defined as "…The right to exert individual or population autonomy through choice in occupations".   This recognition that not only is choice a necessary part in occupations, it is a right of all persons to be afforded choice.   Occupational therapists can advocate and lobby for policies that support and protect caregivers to ensure appropriate breaks are available, including respite. Also, policies around formal and informal support and guidance/training for changing situations would provide individuals with greater knowledge and resources should a person feel overwhelmed or unsure in evolving situations. Occupational therapists can be instrumental in providing resources and advocating for supports.

Transition to Retirement

Retirement is a major transition period for many people (Bryant &Trew, 2006; Denton & Spencer, 2009; Hewitt et al, 2010; Pushkar et al 2012; Shapiro & Yarborough-Hayes, 2008). For some individuals, it is a positive change and it is looked forward to with anticipation; moving on to a new stage in life with new opportunities (Bryant &Trew, 2006).   For others, it can be more daunting, with questions and perhaps concern as to

what new roles or routines an individual will now engage in during their day. Still other individuals may find the change to be a negative one, perhaps because they were not prepared to make the change or other extraneous issues arise (Shapiro & Yarborough-Hayes, 2008).

Regardless of the feelings towards retirement, most individuals would agree there would be a transition period associated with stopping paid employment and going on to engaging in new occupations, routines and roles. This period may be shorter for individuals who adjust quickly and embrace their new lifestyle; for others the period may take longer as they may need more time to disengage from their previous roles and occupations (Hewitt et al, 2010; Pushkar et al 2012; Shapiro & Yarborough-Hayes, 2008). The interviews from this study point to another transition within retirement. A number of participants either alluded to, or pointedly spoke about the retirement life(style) they were presently living in, and the retirement life they thought they would be living. These participants were attempting to determine what retirement meant to them while reconciling within themselves that it was not turning out to be what they had idealized in their mind.

Most of the participants spoke about their retirement and this transition with questions and uncertainty. But, there was also a theme of retirement transition from their current lifestyle and a life that was more like what they hoped retirement was going to be like. There was a sense that some participants were engaging in occupations and/or roles, that they did not feel would define their retirement life in the future. It appears they were participating in these occupations until such a time they were able to do the occupations/lifestyle that they wanted. One participant spoke about how she

wants to spend her time with her grandchildren but she is not able to do that yet. Others

spoke about wanting to do occupations, such as volunteering and/or travelling, but were

citing reasons why they were not able to do that now but planned to in the future.

These participants were able to identify what things they would like to be doing and/or

what they thought they would be doing in retirement yet were not participating in

presently; others were not even able to name what they thought they would rather be

doing, or what their retirement life would like to be like and instead just communicated a

sense of disconnect or a generalized sense of dissatisfaction with retirement life.

This idea of how retirement should look versus the reality of an individual's current

lifestyle could certainly cause negative feelings if an individual does not know how to get

to a position where he/she could pursue their ideal. This negative feeling towards

retirement life could lead a person to feel dissatisfied with retirement as a whole. This

finding illustrates that the transition to retirement is perhaps more complicated, and

longer, than we tend to think. It appears that there might be numerous stages of

transition during this period and that it extends beyond the time of the act of retirement.

Seeing retirement as the beginning of a process of transitions or changes may assist

individuals and therapists alike to address the needs of this population.

This issue of idealized vs realized retirement and an individual's process to work

through this is not highlighted in the literature. Most retirement literature focuses on the

retirement process (Hewitt et al, 2010), health of individuals post retirement (Bailey &

McLaren, 2005; Bryant &Trew, 2006; Doshi et al, 2008; Shapiro & Yarborough-Hayes,

2008), or even an attempt to define retirement since many individuals are still remaining

in the workforce in some capacity post retirement (Denton & Spencer, 2010).

This ideal versus current retirement would be important for occupational therapists to consider when working with retired clients. Knowing that a client has a vision of what they would like their life to be like would be important when looking at areas of issue and setting goals. Occupational therapists being aware of this lifestyle discrepancy could use this information when selecting occupations and when looking at opportunities the client has around them in their home, family and community. This could be an important addition to retirement planning resources as we assist clients to navigate through retirement. Helping retired clients achieve progress towards their ideal lifestyle through intervention could reap benefits that spill over into other areas of their lives as well. For those who have a sense of overall dissatisfaction with their retirement life, occupational therapists may help clients identify their ideal retirement in order to then assist in the process of working through their current reality to address their unrealized ideal and perhaps increase overall satisfaction.

The transition to retirement is a process; one that can take time to work through as individuals' lives are fluid and changing (Hewitt et al., 2009). Hewitt et al (2009) stated that the transition time of individuals was more difficult than anticipated with unpredictable barriers the retiree had to deal with. The idea that it takes time and effort, perhaps more than originally thought by the retiree, to transition into retirement is supported by this current study. Individuals in this study showed they were continuing to explore ways of modifying their lifestyle to achieve the participation in occupations they wanted towards their ideal lifestyle. The participants in this study on average retired 5.5 years ago, suggesting that the process can be quite long.

Meaning and Satisfaction

Meaning as it applies to occupation has many definitions in the literature. It is a value/feeling that a person has for an occupation that he/she is engaging in and therefore, being subjective can only be defined or identified by the individual (Backman 2004; CAOT, 2002; Griffith et al., 2007; Unruh, 2004). Griffith et al., 2007 in their study explored a number of varying definitions of the word meaning and eventually defined meaning as activities that are particularly enjoyed, appreciated and/or considered important to the individuals. Using this definition of the word, the range of the word "meaning" can be attributed to occupations that can only be limited by an individual's ability to identify and name the value that one places on that occupation. Occupations can then be described as having high or low meaning depending on the value the individual attributed to it.

Using the definition of "meaning" as described above by Griffin et al. (2007) for this current study, the two studies appear to support the notion that meaning is subjective and its value (high or low meaning) is provided by the individual and can change over time. One participant in this study spoke about how "mattering" is important. She was able to recognize that it is not the occupation itself but the meaning or importance that has an impact on how an individual looks upon or rates his/her lifestyle overall. She articulated that mattering is what is important to her and that what matters can change.

It is worth noting that meaningful occupations do not always mean occupations have positive connotations attributed to them. An occupation can have meaning that is attributed due to a sense of obligation. This was also evidenced in previous studies (Collins and Swartz, 2011; Savundeanayagam, Montgomery & Kosloski, 2011) where

recognition was given to the positive feelings that might arise from specifically caregiving, but also that negative issues also arise. If this is the case then the occupation would still have importance/value or meaning, but in fact the emotion that is attributed to that occupation is felt to be negative. Obligation or a sense of duty appeared to be the most common reason for negative connotation to meaning in this study. There is an important distinction between occupations that are negative or positive in emotion as both are included when assessing the meaning of an occupation. The individual deems whether the emotion associated with the occupation is positive or negative and this is an important aspect to address when looking at the occupations an individual engages in.

Occupations that have high meaning were filled with importance and value for participants. Thus, when an individual is participating in meaningful occupations, whether the occupation has a positive or negative connotation, a sense of satisfaction usually ensues. For instance, if a grandmother loves to spend time with her granddaughter and plans days out together where child care is looked upon with great happiness, anticipation and joy then that occupation is high (positive) meaning with high satisfaction along with it.

Yet, if another grandparent felt like they had to be the primary child care provided for their grandchildren and every day had to structure their day around the needs of their grandchildren thus limiting activities they would like to do, then this occupation of child care may carry a negative connotation. This negative connotation however may still provide the grandparent with a sense of satisfaction as they feel that they are providing a valuable service to their grandchildren and are able to be involved in their

lives. Thus, high meaning and high satisfaction are achieved even though the initial

feeling about this occupation, child care, might be negative. The literature regarding

meaning explored issues around emotion and addresses positive (Griffith et al., 2007;

Johannsesen et al., 2004; Yuen et al., 2007) and negative emotion (Collins and Swartz,

2011; Saban, Sherwood, deVon & Hynes, 2010; Savundeanayagam, Montgomery &

Kosloski, 2011). The literature does not address intensity of meaning-- how an

occupation can have high or low meaning to an individual. I believe this is an important

distinction to address when discussing engagement and occupation. It provides

valuable information regarding how and individual values that occupation and its impact

upon their satisfaction and retirement lifestyle.

Low meaning occupations, especially when combined, can also provide an

overall feeling of satisfaction for a participant. An individual can participate in low

meaning occupations throughout the day, for example cleaning closets, washing floors,

doing laundry. Some participants attributed neutral or low meaning towards those

occupations. Each one could be seen as low or neutral meaning throughout the day

when completed; however when a person looks back over the entire day he/she could

feel a sense of satisfaction from the accumulation of completed occupations even if

each one elicited low meaning on its own. This is an important finding in this study as it

provokes the discussion regarding how meaning and satisfaction interact with each

other.

The meaning an individual attributes to occupations can influence the level of

satisfaction one has about the completion or engagement in that occupation. The

satisfaction with occupations over a day or a lifestyle can then influence how a person

feels about retirement in general. If a person feels that the occupations are important and meaningful, then they are apt to describe themselves as satisfied with retirement. If a person feels that they are engaging in low meaning occupations then a sense of dissatisfaction with retirement can occur. The interesting twists are when an individual identifies low meaning occupations and still identifies being satisfied with retirement. This may be explained as described above as an accumulation of low satisfying occupations can lead to an overall feeling of satisfaction. However, what happens when an individual engages in high meaning occupations but overall identifies being not satisfied in retirement? This may be explained when the issue of personal choice, or control, is considered. As was discussed, a sense of control is important to the level of satisfaction of an individual. If a person is engaging in (high) meaningful occupations but does so out of a sense of obligation or due to external factors, without a personal choice to choose these occupations then satisfaction with occupations will remain low.

The fact that these incongruities exist presents an interesting perspective when working with these individuals. This is important for occupational therapists to not only ask about occupations their retired clients are participating in, but also to ask about their level of satisfaction. When we are looking at goal setting and occupations that are meaningful, knowing the positive/negative connotations could assist in guiding clients to find a balance. As a minimum, we could use this information to ensure not all meaningful occupations in their lives have a negative connotation or tone. Also, if low meaning occupations are engaged in but the client is still satisfied then our role is different than when the client is expressing low satisfaction with those low meaning occupations. Unless a person is detailed enough in their discussion to give you a clear

indication of the level of meaning and satisfaction in their occupations and overall lifestyle satisfaction, then further questioning may be required to obtain a clear plan and viable goals. Meaningfulness and importance of occupations do not necessarily equate to satisfaction and pleasure.

Limitations of the Study

This study has inherent limitations due to its design and implementation. The study has a small sample, with eight participants included. The eight participants were interviewed with the semi structured approach, allowing for refinement of questions to elicit the desired information to occur. This approach may have inadvertently resulted in less information from the initial participants while the interviewer refined her approach and questions. The questions asked, particularly early on, may not have captured the complete experiences of the participants. Also, the ability of the interviewer to elicit information from participants may have limited what information was obtained as the researcher was a novice at this style of interviewing. The researcher did review interviews with her supervisor to ensure relevant information was highlighted and obtained.

Also, because the interviewer did not have an established relationship or rapport with participants, they may have been reluctant to disclose information. The study proceeded based on faith that the participants were insightful and truthful, however without established trust with the interviewer some participants may have only reported ideas they thought were appropriate or acceptable to say. The interviewer attempted to minimize feelings of discomfort with the process by offering participants a choice of

either in person or telephone interview; with perhaps the mode of interview effecting the comfort level of the person. By leaving it up to the individual it was assumed that they would choose the method they would feel most comfortable discussing their feelings through. However, when answering the questions there might have been limitations associated with face to face or telephone interviews.

The participants were also a self-selected interview sample. Therefore, those that took the initiative and time to call the researcher were included, with recruitment taking quite a while to complete. This meant that participants would need to be out in the community to see advertisements, or to read about them in one of the community newsletters. This left out a large segment of population in the city who may not have come into contact with the advertisements, had time to participate, or lacked the initiative to call the researcher.

Recruiting for participants who self-identified as being less satisfied in retirement proved to be challenging and took significantly more time then recruiting for those who self-identified as satisfied. It is impossible to know for certain why individuals were reluctant to participate however some reasons might include: a reluctance to disclose personal details to a stranger; decreased mental or physical health and marketing issues. It was difficult to reach individuals who were not active members of the community. The individuals would either have to see an advertisement in a community flyer, on Kijiji or within the Kerby Centre. Most individuals who access the Kerby Centre are those who are active within the centre, taking part in their activities and supports. Those individuals who are at home and are not accessing these venues would not be

reached, and those were the individuals who would have been excellent candidates for inclusion.

Finally, the research focused upon retired individuals who were living in Calgary, Alberta. With the sample limited to just the urban city, the experiences of individuals living in rural areas were not available or included. Furthermore, the study was conducted in a city and province where during the employment years of the individuals the economic outlook was one of prosperity with wages being competitive and consistent and living conditions were favorable (lower taxes than the national average, abundant job opportunities, and higher income brackets). This could influence the outlook and current (financial) stability of the volunteers in this study when compared with their counterparts in other provinces during the same time frame.

Chapter 6

Conclusion

This qualitative, descriptive study used semi structured in depth interviews to explore meaningfulness of occupations of retired adults living in the community. Retirement is an important life transition, and there is a burgeoning population of individuals in this stage.

Three themes emerged from the interviews related to satisfaction with retirement emerged as most important in the ways that participants described their experiences in the interviews. Participants expressed establishing retirement life, occupations and social interactions as being affected by a sense of personal choice which was reflected in their overall retirement satisfaction.

When addressing meaningful occupations in retirement the findings from the interviews suggest there are three key messages. Transition into retirement, personal choice (a sense of control) and meaning and satisfaction were the messages which influenced the individual's participation in occupations and the overall satisfaction with their retirement. Transition to retirement was influenced by the individual's ideal of what retirement was supposed to be, barriers to achieving the ideal retirement and control/choice as to how and when to retire. Transition is an evolving process in retirement as changing priorities and influencing variables (health, finances, obligations) combine into a process that may take many years to work through.

Personal choice regarding participation in occupation influences an individual's sense of satisfaction in occupations and with retirement life. Having personal choice

in occupations, social interactions and establishing retirement life heavily influenced satisfaction in retirement.   Meaning attributed to occupations was important as it was established by the individual and was considered not just as emotion (positive or negative) but also in its intensity. The importance of exploring the intensity of meaning, high or low, was also apparent in the study. The complex issue around meaning, intensity of meaning and satisfaction has not been well documented in the literature. In my research intensity (high or low) became significant when addressing both meaning and satisfaction of occupations and overall retirement life of participants. This finding contributes to the growing body of knowledge of retirement and occupations in retirement.

Intensity of the meaning of occupation, whether an individual had choice in occupation and their degree of satisfaction highlights areas where occupational therapists can make a difference when addressing issues around occupation with retired individuals. Occupational therapists can use these constructs to ensure a more comprehensive awareness of an individual's situation and the factors which may be influencing occupational performance issues.

Further research into the issues surrounding personal choice and the complex relationship it has with occupation and satisfaction would further the understanding of this study. As well, the attribution of meaning to satisfaction, the notion of high and low meaning given to an occupation, and is under researched in the literature. A deeper understanding of meaning and its effect on overall satisfaction would be a beneficial next step from this research study.

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Appendix A
Calgary Based Organizations Advertising Study

Kerby Centre

The Kerby Centre is a not-for-profit organization, committed to enhancing the lives of older adults. The Kerby Centre strives to assist older people to live as well as possible, for as long as possible, as residents in the community.   This organization in 2010 recorded over 182000 contacts with the older adult population in Calgary (www.kerbycentre.com). This organization was identified by the Calgary Resource Society, Calgary Chapter of Alberta Association on Gerontology and by the Geriatric program at Alberta Health Services as the most widely used seniors organization in Calgary. The Kerby Centre has an extremely wide network and reaches a vast number of seniors through activities at their centre, their newsletter, advertisements through community and city newspapers and their website.

http://kerbycentre.com/   Nov 5th 2011

Appendix B
Permission letter from the Kerby Centre

From: Carole Talbot <carolet@kerbycentre.com>
To: Angela Young <young_ange_1999@yahoo.ca>
Sent: Monday, September 26, 2011 2:18:29 PM
Subject: RE: Community contacts

Hi Angela!

After speaking with my manager he said it would be ok to post a poster here at the Kerby Centre. There is also the Kerby newspaper that you could post it in, however there is a cost for posting ads in the paper. I will give you our mailing address if you wish to send us a poster.

1133 7th Avenue SW

Calgary, AB

T2P 1B2

Att: Carole Talbot

If you require more information please feel free to contact me by email or telephone.

Sincerely,

Carole Talbot

Support to Information

Kerby Centre

403-705-3224

Are you retired?

Is it what you had hoped retirement would be?

I am interested in talking to anyone who is retired and is willing to participate in a research study. I am a Dalhousie University graduate student studying the activities of retired adults and their level of happiness and satisfaction through telephone interviews or in person interviews at your home. I am looking for both men and women, who are married, widowed or single and living in their own homes in all areas of the city. All participants need to be retired for 10 years or less, speak English and be able to have an hour long conversation. Please contact me if interested.

Angela Young

Phone (403) 271-7421 or e-mail angeleeam@hotmail.com

Appendix D
Screening Questions

1. Do you consider yourself retired?

   a. How long have you been retired?

   b. Why do you call yourself retired?

2. Are you working now?

   a. If yes, is it your main source of income?

3. Are you enjoying your retirement?

   a. Is it not what you had hoped it would be?

4. Are you living in your own place?

   a. Do you live in a nursing home, assistive living apartment or a hospital?

5. Are you married?

   a. Widowed?

   b. Single?

   c. Other

6. What quadrant of Calgary do you live in?

   a. What community?

Appendix E
Letter to Participants

Dear

Thank you so much for volunteering to be a part of our research study looking at the activities of retired adults and the level of satisfaction that occurs. I am so appreciative of your time involved in completing the upcoming on person/telephone interview on _____. It should take approximately an hour, however we can break up the interview if it becomes too tiring during the process. One interview should be all that is required, however if clarification or further exploration of a comment needs to be completed one extra interview- of approximately 10 to 20 minutes may be requested.

The questions we will be talking about center upon the activities you do every day and how you feel about them. We will explore your special interest activities as well as your least favourite activities and your feelings about each of these. We will spend some time talking about the most important activities you do and what makes you feel good during the day. Finally I will ask you questions about things that may be helping and/or limiting your involvement in activities.

In the process of talking about your activities, and especially those activities which may be important to you and you are not able to do at this time, you may experience sadness or feelings of loss. I am hoping this will not happen, and I will try hard to look at many different types of activities with you to limit any possible risks associated with being in this study. Also, sitting and talking on the phone for an hour may cause you to feel stiff or uncomfortable. Please feel free to move around and change positions often during the interview. If we are doing the interview by telephone then use speaker phone if that is easier! There are no anticipated direct benefits to you for participating in

this study, however hopefully, you may feel good about being able to share your opinions and feelings about your life after retirement.

Please find enclosed a copy of the consent form and read it over. A consent form is a document that explains the study and your participation. It needs your signature to show you have read and understand the roles, requirements, risks and benefits of participating. If you have any questions before our scheduled interview do not hesitate to contact me. My telephone number and e-mail address are listed below. We will go over the consent form before starting the interview and I will ask you for verbal agreement at that time before we proceed.

Thanks again in advance and looking forward to talking with you on the _____ at _____.

Angela Young
Researcher
(403) 271-7421 phone
angeleeam@ hotmail.com

Appendix F
Consent Form

Meaningful Activities of Community based Retired adults-
What are the facilitators and barriers?

Please feel free to contact the researcher with any questions or comments.

Researcher   Angela Young, BSc, BScOT
              School of Occupational Therapy
              Dalhousie University
              5869 University Avenue
              Forrest Building, Room 215
              PO Box 15000
              Halifax NS B3H 4R2
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We invite you to take part in a research study being conducted by Angela Young who is a graduate student at Dalhousie University, as part of her Post professional Masters program. Your participation in this study is voluntary and you may withdraw from the study at any time. The study is described below. This description tells you about the risks, inconvenience or discomfort that you might experience. Participating in the study might not benefit you, but we might learn things that will benefit others. You should discuss any questions you have about this study with Angela Young.

Purpose of the Study

To learn about the activities of retired adults who live in the community and any issues which may help or hinder your involvement in these activities. Also, the level of satisfaction that occurs from doing these activities will be addressed.

Study Design
This study is a qualitative study where the participants are volunteers from the community. In-depth interviews will be used to collect information. There will be 10 participants involved in this study.

Who can participate in the study

You may participate in this study if you are retired for ten years or less and are living in your own home in the community. If you are living in an assisted living facility, a nursing home or hospital based unit then you are not able to participate. Also, if you are unable to express yourself through a telephone conversation, if you cannot speak English or if you still rely on working for your main method of bringing in money then you are not able to participate.

Who will be conducting the Research?

The Principal Investigator for this study is Angela Young BSc, BscOT, who can be reached at (403) 271-7421. Her supervisor for this study is Dr. Robin Stadnyk, PhD (902) 494-8804. Any questions or comments regarding the study should be communicated to Angela Young. Any concerns regarding the principal investigator should be communicated to Dr. Stadnyk.

What you will be asked to do

If you volunteer to participate in this study, you will be asked to participate in a telephone discussion looking at all the things you would do in a day. The discussion will ask you to describe the level of happiness or satisfaction you have from doing each activity. Also, the discussion will ask about any activities

that you would like to do but aren't and your reasons for not doing these activities.

The interview will be with Angela Young and is designed to last approximately an hour. You will not need to go outside of your home to participate. It is your choice whether the interview is completed over the telephone or in person with the researcher coming to your home. It is expected only one conversation will occur, however in special circumstances a follow up telephone conversation may be necessary to clarify or more fully explore a comment. The initial discussion will last approximately one hour.

If, during the interview you would like to stop the conversation you may do so at any time. If you would like to resume the interview another day, then another time will be arranged. You may also refuse to answer any questions you don't want to answer and still remain in the study. You may withdraw from the study at any time.

Possible Risks and Discomforts

The risks involved in this study are likely minimal and might include sadness and discomfort when talking about personal happiness and satisfaction, especially when exploring activities that you are not able to be do at this time. The interview will focus on all your activities as to not solely focus on just the activities which may bring you sadness. Also, some physical restlessness may occur during the hour long interview. Please feel free to move around and make yourself comfortable during the interview.

Possible Benefits

There are no anticipated direct benefits to you, the participant. The potential benefits might include satisfaction from offering your opinion and insights into participation and happiness through every day activities.

Compensation / Reimbursement

There will be no payment for participation in this study.

Confidentiality & Anonymity

Anonymity:

If you participant in this study, you will not be identified in any presentation, reports or publications. Your name will not be used and an alias will be given to your information if a quote needs to be used.

Use of quotations:

If direct wording, sentences or excerpts of discussion are to be used in any report, presentation or publication then the quotation will be attributed to the individual by their alias, and not in any manner will be able to be singled out to you, the individual.

Confidentiality:

Every effort will be made to ensure confidentiality of any identifying information that is obtained in connection with this study. All data gathered will be kept in a locked file drawer in the home of the researcher. The interviews will be audio taped to ensure the accuracy of information. You have the right to read and review the transcripts of the interview at any time and to edit the information if necessary. A copy of your transcript, and/or the final paper, can be mailed to you if you wish. The audiotapes and transcripts will be kept in a locked cabinet while in the care of the transcriptionist. The audiotapes will be erased once transcript of the interview has been completed. Copies of the transcripts, where all names and identifying information will be removed, will be mailed to Dalhousie University and securely stored by the School of Occupational Therapy for five years.

During the interview, if a situation of abuse is described then the researcher is obligated to report this to the police if you are in imminent danger.

Termination

The study may be terminated by either you or the researcher at any time. The participant can terminate their involvement at any time and any data collected up to that time will be immediately destroyed. The researcher may ask you to withdraw if you have a change in living arrangements and you no longer live in the community before the interview is completed.

Problems or Concerns

If you have any difficulties with, or wish to voice concern about, any aspect of your participation in this study, you may contact Catherine Connors, Director, Research Ethics, Dalhousie University for assistance at (902) 494-1462, ethics@dal.ca. Please note that collect calls are accepted.

Signature Page

**Meaningful Activities of Community based Retired adults-
What are the facilitators and barriers?**

**Yes____ No ____   I have read the explanation about this study. I have been given
the opportunity to discuss it and my questions have been
answered to my satisfaction. I hereby consent to take part in
this study. However I realize that my participation is voluntary
and that I am free to withdraw from the study at any time.**

**Yes____ No ____   I consent to being audio taped during the interview and any
follow up phone calls if requested.**

**Yes____ No ____   I agree to be re-contacted in the future for clarification of
points in my initial interview.**

Signature of participant_____

Date_____

Appendix G
Semi-Structured Interview Guide for
Meaningful Activities of Community Based Retired Adults Study

1. Description of Activities

   (a) To begin with, I want to gain a general picture of the sorts of things that you do. Could you describe what you do during a typical morning…typical afternoon..typical evening?
   Probes
   - Further description of specific activities
   - Social context of activities
   - Environmental context of activities
   - *Feelings/opinions regarding activities
   - *Why they started/continue to do the activity
   - *Changes in the way they do an activity/how much they do an activity

2. Preference for Activities

   (a) What are your favourite things to do?
   Why do you like doing these things?
   Probes
   - Could discuss each activity mentioned above with respect to: feelings (during and after), outcome, opportunity for, *who with, degree of choice, *reasons for doing.

   (b) What are your least favourite things to do?
   Why do you dislike doing these things?
   Probes
   - As in 2a
   - *Do they avoid doing these things?

3. Personal Relevance of Activities

   (a) Of all the things that you do, which are the most important for you to continue doing?
   Probe
   - How come?

(b) What would it mean to you if you could no longer do the things that you consider important?

    Probes

- Break it down into specific activities mentioned in 3 (a)
- Possible emotional, social, and instrumental effects
- If a person talks about health restrictions only: What would you do if a circumstance other than health problems, such as a change in where you lived or a lack of money, was the reason that you couldn`t do the things that are important to you?

4. Happiness in retirement

(a) How are you enjoying retirement?

    Probes

- Can you tell me more
- Why did you say that

(b) Is retirement what you had hoped it would be like?

- What do you like about retirement?
- What has surprised you about retirement?
- What would you change?

5. Satisfaction with Activities

(a) If you could create for yourself the most satisfying day possible, what sorts of things would you do on that day?

    Probe

- Why they chose specific activities

(b) When you look back at a day, what makes you feel as though it was a good day?

When you look back at a day, what makes you feel as though it was a not so good day?

    Probe

- *If a person responds that they do not look back at a day, then ask them what makes up a good day; what makes up a not so good day?
- Does having a variety of things to do during a day affect how you feel? How?
- Is it important that you have enough things to do? Why?

(a) What are the things that are limiting how satisfied you are with the things that you do?

Why do these things limit your sense of satisfaction?

How could you become more satisfied with the things that you do?

6. Barriers to Participation

(a) What are the things that you would like to be doing that you are not doing?
Probes
- For what reasons do you want to do these things?
- *Discuss things that person used to do and is not doing anymore.

(b) What are the reasons for you not doing these things?
Probes
- Physical limitations
- Financial considerations
- Transportation issues
- Social withdrawal
- Community issues

(c) What would you need to be able to do these activities again?

(d) How does it make you feel to not be able to do those things?

(e) How do you deal with it?

(f) How important were those things to you?

Final: Are there any other comments that you would like to make about the things that you do?

Appendix H
Interview Guide Comparison Table

Final Interview Guide for Study Conducted with Seniors Laliberte-Rudman & Moll. (2001).	Semi-Structured Interview Guide for Meaningful activities of community based retired adults study
1. Description of Activities (a) To begin with, I want to gain a general picture of the sorts of things that you do. Could you describe what you do during a typical morning…typical afternoon..typical evening?	1. Description of Activities (a) To begin with, I want to gain a general picture of the sorts of things that you do. Could you describe what you do during a typical morning…typical afternoon..typical evening?

2.Preference for Activities
 	
(a) What are your favourite things to do?
   Why do you like doing these things?
 	
(b) What are your least favourite things to do?
   Why do you dislike doing these things?
	2. Preference for Activities
	
	3. What are your favourite things to do?
	   Why do you like doing these things?
	
	(b) What are your least favourite things to do?
	   Why do you dislike doing these things?

3. Personal Relevance of Activities (a) Of all the things that you do, which are the most important for you to continue doing? (b) What would it be mean to you if you could no longer do the things that you consider important?	3.Personal Relevance of Activities (a) Of all the things that you do, which are the most important for you to continue doing? (b) What would it mean to you if you could no longer do the things that you consider important?
	4. Happiness in retirement (a) How are you enjoying retirement? (b) Is retirement what you had hoped it would be like?

Final Interview Guide for Study Conducted with Seniors Laliberte-Rudman & Moll. (2001).	Semi-Structured Interview Guide for Meaningful activities of community based retired adults study
4. Satisfaction with Activities (a) If you could create for yourself the most satisfying day possible, what sorts of things would you do on that day? (b) When you look back at a day, what makes you feel as though it was a good day? When you look back at a day, what makes you feel as though it was a not so good day? (c) What are the things that are limiting how satisfied you are with the things that you do? How could you become more satisfied with the things that you do? (d) What are the things that you would like to be doing that you are not doing?	5. Satisfaction with Activities (e) If you could create for yourself the most satisfying day possible, what sorts of things would you do on that day? (f) When you look back at a day, what makes you feel as though it was a good day? When you look back at a day, what makes you feel as though it was a not so good day? (g) What are the things that are limiting how satisfied you are with the things that you do? How could you become more satisfied with the things that you do? (h) What are the things that you would like to be doing that you are not doing?
5.The Relationship between Activity and Well-being (a) What do you think contributes most to your well being? How do these things contribute to your well being? (b) If you were to give advice to a person about what can help someone be healthy as he or she ages, what would you say?	6. Barriers to Participation (g) What are the things that you would like to be doing that you are not doing? (h) What are the reasons for you not doing these things? (i) What would you need to be able to do these activities again? (j) How does it make you feel to not be able to do those things? (k) How do you deal with it?

	<u>Semi-Structured Interview Guide for Meaningful activities of community based retired adults study</u>
	6. Barriers to Participation (I) How important were those things to you?

Screening questions	Rationale

Do you consider yourself retired?
    How long have you been retired?
    Why do you call yourself retired?
	This confirms an inclusion criteria. An individual must self identify as being retired and must be retired within the last 10 years

Are you working now? If yes, is it your main source of income?	To be included in the study an individual must be obtaining less than of 50% of their income through paid employment.
Are you enjoying your retirement? Is it what you had hoped it would be?	This needs to be included as it is one of the purposes of the study
Are you living in your own place? Do you live in a nursing home, assistive living apartment or a hospital?	To be included in the study an individual must currently reside in the community

Are you married?
    Widowed?
    Single?
    Other
	These questions are being asked to that include some diversity of marital situation if possible.

What quadrant of Calgary do you live in? What community?	This question is being asked to ensure that participants are coming from Calgary. Full addresses will be requested for mailing of consent forms and/or in-person interviews.

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