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# A dream of a retirement: The longitudinal experiences and perceived retirement wellbeing of recent retirees following a tailored intervention linking best possible self-expressive writing with goal-setting

Julie Round & Jolanta Burke

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**Objectives:** *The research aimed to analyse retirees' experiences of a tailored positive psychology intervention (PPI) combining Best Possible Self (BPS) expressive writing with goal-setting and to explore its potential as an aid to retirement wellbeing. This is the first time, to our knowledge, that BPS and goal-setting have been employed as a combined approach.*

**Design:** *This was an experimental study design using qualitative analysis methods, namely interpretative phenomenological analysis, alongside participatory action research.*

**Methods:** *Three recently retired women participated in the project. Semi-structured interviews and groups were used.*

**Results:** *The intervention contributed to feelings of retirement wellbeing by boosting a number of meaning-related factors (such as self-awareness, purpose in life and intrinsic goal-progress), bringing about an overall improvement in hedonic-eudaimonic balance.*

**Conclusions:** *Findings suggest a need for further research into the newly combined intervention and into its most appropriate delivery format(s) for retirees (e.g. online versus face-to-face). Given the intervention's potential to elicit wellbeing-maximising goals, the current findings have relevance for populations beyond the retiree community.*

**Keywords:** *Best Possible Self; goal setting; self-concordance; retirement; positive psychology intervention; meaning in life; older people.*

INCREASES in life expectancy mean that the average retirement is now 20 years long (Office for National Statistics, 2012) and healthier than ever (Koch, 2010). Whilst often viewed as a utopian time of life, transition into non-working status can also bring social, emotional and practical challenges (Laura, 2014; Robertson, 2014), with around one-third of retirees suffering stress at some stage (Bosse et al., 1993).

There is currently a deficit of provision for the wellbeing and adjustment of retirees (Robertson, 2014), despite the significant impact of retirement on their 'sense of purpose', 'identity' and day-to-day 'behaviours'.

Given the burgeoning older population and topics of loneliness and isolation hitting the socio-political agenda too (Jopling, 2015), the matter of enhancing wellbeing during retirement feels timely and appropriate.

With coaching-type interactions generally tied into some form of 'feel better' goal, the sciences of coaching psychology (CP) and positive psychology (PP) are natural and valuable partners, and indeed there is a growing body of research bringing the two together (e.g. Pritchard & van Nieuwerburgh, 2016). Yet there has been little focus on the just-retired lifestage, so this study aims to explore how recent retirees

might be supported in making the best of such a significant chunk of their lives. Can the two sciences combine forces to promote 'post-career' flourishing?

This research introduces a novel, two-phased intervention, which links a reworked positive psychology intervention to subsequent goal-setting. Best Possible Self Goals (BPSG) (Round, 2016) combines a tailored version of King's Best Possible Self expressive writing (BPS, 2001) – deemed helpful in highlighting one's values and priorities – with goal-setting. The aim is to explore BPSG's value as a tool for retirement adjustment and wellbeing via the establishment of self-concordant goals, with self-concordance referring to those goals most positively associated with wellbeing because they match personal values and interests (Sheldon & Elliot, 1999).

Indeed, Seligman (2016) continues to highlight the wellbeing benefits of having personal goals, and research has linked these to positive outcomes in retirement adjustment and to wellbeing in general amongst older populations (Payne et al., 1991; Robbins et al., 1994). Finding self-concordant goals is not straightforward, however, and individuals often fail to select goals which truly represent their needs (Sheldon & Elliot, 1999). The freshly combined PP/CP (expressive writing plus goal-setting) intervention is intended to help overcome this particular stumbling block in goal-setting – via the precursor of Best Possible Self writing.

### **Literature review**

Robertson (2014) suggests that the very concept of retirement itself is ready for a revised narrative, away from the clichéd view of this time of life as one of leisure, reminiscence and relative inactivity. Similarly, it is perhaps also time for researchers to acknowledge and pay attention to a distinct 'healthy retired' lifestage as it would appear from our literature review that this particular population has fallen, largely unnoticed, between the fields of PP and CP (typically youth to middle-aged focused) and psychogerontology (generally long-retired and with health

limitations) (Round, 2017). Where retirement research does exist, it has traditionally focused on financial goal-setting, with little consideration of psychological and transition planning. Correspondingly few positive psychology interventions (PPIs) have been directed at older adults and even fewer explicitly at the recently retired. We outline key examples of older adult interventions below. These make reference to the two types of wellbeing – 'eudaimonia' and 'hedonia' – with the former more broadly related to meaning and purpose in life and the latter to pleasure (Bonniwell, 2012; Wong, 2011).

Most recently, a PP-inspired community programme in the US (Friedman et al., 2017) did bring quality-of-life uplift to older adults by focusing specifically on eudaimonic (meaning-related) wellbeing. The programme consisted of group sessions to encourage the savouring of positive experiences and was successful at building psychological wellbeing, shown to moderate the risks of depression and isolation in older age (Ryff, 2014). However, in tailoring this from the original adolescent programme, the researchers exchanged a future goal-setting task for one focusing solely on past goal-achievements, despite the widely-documented connection between future life goals and wellbeing across all life-stages (e.g. Brunstein, 1993; Erikson et al., 1986; Schmuck & Sheldon, 2001). The omission of future goal-setting perhaps missed a broader opportunity then for galvanising retirement plans towards increased purpose and meaning (eudaimonia), conceivably sticking instead to older-person stereotypes around the notion of reminiscence.

Other older adult programmes have shown positive shifts in hedonic wellbeing but, as Friedman et al. (2017) highlight, it's actually the eudaimonic aspects which decline with age. Eudaimonic wellbeing is positively correlated with better physical health, such as reduced risk of heart attack, stroke and Alzheimer's (Boyle et al., 2010; Kim et al., 2012). Therefore, an intervention that aims to increase eudaimonic wellbeing could be particularly beneficial for retirees.

As Seligman (2016) proposes, 'we're pulled by the future, not pushed by the past'. Goals drive behaviours and energise us, positively influencing day-to-day experience and, importantly, helping us to address emotional and wellbeing needs (Cantor & Blanton, 1996). As mentioned, there is a long-established and well-researched link between goal-setting and wellbeing (Brunstein, 1993; Emmons, 1991; Sheldon & Elliot, 1999), including in older populations (Payne et al., 1991; Robbins et al., 1994).

Future goals are also shown to have critical relevance for adaptation/transition (e.g. into retirement); they support emotional stability and help mediate personal resource towards positive change (Kohut, 1977; Robbins et al., 1994). Lybomirsky advocates, 'In a nutshell, the fountain of happiness can be found in how you behave, what you think and what goals you set every day of your life' (2008, p.67). Despite this, PPIs aimed at older populations have typically been past-biased, such as reminiscence, gratitude or life review (e.g. Friedman et al., 2017; Killen & Macaskill, 2015; Ramírez et al., 2014).

Selecting beneficial goals isn't straightforward, however. Sheldon and Elliot (1999) highlight that we can lose touch with ourselves or make choices informed by external (e.g. societal or familial) expectations. Moreover, the array of possibilities in life can appear overwhelming too (Schwartz, 2000), and particularly so with all the freedom of retirement. Thus, when selecting goals, it seems crucial to help retirees connect with their authentic selves and to narrow down their focus. Therefore, BPSG (Round, 2016), with expressive writing as a precursor to goal-setting, is intended as an enabler towards deeply personal, value-driven and prioritised, self-concordant goals.

The psychology term 'possible selves' is described by Markus and Nurius as 'the ideal... that we would very much like to become' (1986, p.954) and is of value because it incentivises behaviour towards future outcomes and enables evaluation of the current self. In the original intervention, 'best possible self (BPS; King, 2001), this

ideal self is explored via a four-day (20 minutes per day) expressive writing task, deemed to bring to the fore deep-seated values and interests. Sheldon and Elliot's (1999) self-concordance model proposes that goals driven by an individual's values and interests bring greater wellbeing outcomes, motivating behaviours towards an upward spiral of progress and improving daily experiences.

A number of other 'possible selves' interventions (including non-writing interventions) exploring academic, physical and social possible selves have shown positive association with self-regulatory behaviours and goal progress (e.g. Ko et al., 2014; Strachan et al., 2017), as well as with academic performance and personal development (Ruvolo & Markus, 1992). Pertinent to retirees (yet not yet researched amongst them) is that BPS has also been shown to aid psychological adjustment to change (Rivkin & Taylor, 1999), and by its very nature is deemed a personally relevant and energising intervention (Roberts et al., 2006). Teismann et al. (2014) also evidenced a lowered cortisol response alongside a reduction in rumination. Combining BPS with goal-setting may therefore hold multi-layered benefits at retirement, a time of significant readjustment and potentially challenged emotional equilibrium.

To date, versions of BPS have largely been researched amongst student and youth populations, however, and with only limited direct linkage to goal-setting, most notably in a resource-heavy Possible Selves Programme (Hock et al., 2006), which delivered positive outcomes for student learning. Hock et al. concluded: 'there is a paucity of studies investigating how to effectively teach individuals to become aware of their possible selves and how to set and work towards meaningful goals' (p.769).

The inspiration for this intervention, King's BPS research (2001), showed an immediate uplift in positive emotion, increased subjective wellbeing after three weeks and fewer doctor's visits five months later. Subsequent BPS writing research has additionally shown enhanced levels of opti-

mism (Meevissen et al., 2011) and boosts to positive affect (Layous et al., 2011; Sheldon & Lyubomirsky, 2006). Research to date has, however, largely omitted to consider outcomes beyond affect and has not explored its longitudinal influence (aside from physical health benefits).

To the authors' knowledge, there are no BPS writing interventions which have been directly linked with goal-setting and a paucity of research generally amongst the newly-retired. Yet Petkoska and Earl's research (2009) specifically suggests the centrality of personal goals to retirement planning across all domains (health, leisure and travel, interpersonal and work, as well as the more ubiquitous financial goal focus). They summarise that blanket retiree interventions are unlikely to deliver lasting results, with the notable exception of goal-setting: 'Given that goals are malleable and not fixed characteristics of an individual, goal-setting could represent an important ingredient in the design of interventions promoting holistic retirement planning' (p.250).

Overall, BSPG aims to provide a narrative platform, enabling retirees to engage with their future ideals in a meaningful way, as a precursor to self-concordant goal-setting. It will also help plug the BPS literature gap by considering longitudinal outcomes more broadly (beyond affect) and will look at the qualis or 'nature of' (Barnham, 2008) their intervention experiences via depth of qualitative insight. A quantitative research bias has meant that much of the detail relating to the very personal writing process and its associated thoughts, emotions and behaviours has also remained unexplored.

## Method

### *Research design*

A relatively experimental methodology was selected, combining participatory action research (PAR; Baum et al., 2006) with interpretative phenomenological analysis (IPA). This combined research design was aimed at bringing about real world change via praxis or 'informed, committed action' (Smith, 2011).

The synthesis was also intended to actively

engage the participant in reflexivity, harnessing this as a valuable part of the research and in line with Mead's (1934) proposition that output from a process can sensibly become a factor in its development. Smith (personal communication, 16 July, 2016) asserts that a range of combined action research-IPA positions are indeed possible, although few have attempted it to date (e.g. Hutchinson & Lovell, 2012; Smith, 1994).

Closing the gap between researcher and researched (O'Brien, 1998), the objective is to build knowledge from practice and for this to be informed by an idiographic view of participant experience via IPA. PAR was selected as it embodies a dedicated, collaborative approach to knowledge and action (McNiff & Whitehead, 2010). Theoretically, action research represents a sound choice for exploring an intervention delivery within its socio-cultural context, whilst IPA is valid for understanding interventions and significant life events such as retirement (Smith, 2004). Unlike much action research, this study didn't involve a sequential approach, but focused more intently on bringing depth of participant insight, whilst identifying opportunities for future revisions and delivery routes (ideally BSPG would be disseminated online or adopted into living practice).

IPA was chosen over alternative qualitative methods, such as thematic analysis or grounded theory, because it gives more opportunity for interpretation and reflexivity (Smith et al., 2012). As a phenomenological approach, both empathic and questioning hermeneutics were used (i.e. both identification with and critique towards participants) in trying to make sense of them (Smith & Osborn, 2007). As regards interpretative ownership, the author delivered the final interpretation of all accounts, whilst visibly representing retiree voices.

A mix of in-depth interviews and groups were identified as the optimal route to data collection, with interviews to enable sharing of idiographic experience and groups to provide fertile ground for considering context and future ideals (Keegan, 2009). There

are already examples of successful hybrid approaches (e.g. Macleod et al., 2002) and comparable project designs lie at the heart of consumer research (Keegan, 2009).

Conventional quantitative methods were ruled out because the aim was to explore the nature of participants' experience rather than to measure it at this preliminary stage and to research with – not on – participants, thus valuing the voices of those most impacted by the study (Smith, 1994).

### **Participants**

The study focused on a tight group of three female participants recruited via an e-mail sent to local community networks in south west London. The e-mail outlined the purpose of the project and sought volunteers aged 55 to 65, who were 3 to 36 months voluntarily retired from full-time employment. All female and from similar socio-economic backgrounds (BC1), the study aimed at maximising participant homogeneity in order to support depth and clarity of findings at this initial stage (Smith et al., 2012), with the intention that clear, insightful outcomes could inform future (larger scale) quantitative pieces from the bottom up (Thin, 2016).

Summary of participants (their names have been changed):

- Kelly, aged 61, 3 months retired;
- Sarah, aged 64, 18 months retired;
- Alice, aged 62, 29 months retired.

### **Procedure**

- (i) *Introducing the intervention:* The aim of an initial group discussion was to briefly explore the subject of retirement with participants before introducing the two-part (self-administered) BPSG intervention. Participants were also provided with personal journals intended for their expressive writing (and any ad hoc reflections).
- (ii) (a) *BPSG, part 1:* Four days of 'best possible self' expressive writing (20 minutes per day) carried out independently at home. In line with King's (2001) recommendation of tailoring BPS writing to its

audience, the original instructions were reworked for retirees (see Appendix 1). These were also designed to cue breadth of self-exploration by shifting participant perspectives daily (Round, 2016); (b) *BPSG, part 2:* Participants received an e-mailed SMART-style 'Goal-setting Think Sheet' for independent completion of up to five goals per participant (see Appendix 2).

- (iii) *Initial interviews:* One week later. To explore participants' writing and goal-setting experiences in depth.
- (iv) *Core research interviews:* Three months later. To explore the intervention and its longitudinal outcomes more holistically (i.e. thoughts, feelings and goal activity; present outcomes and projected futures; any sense of retirement adjustment; influence of expressive writing on goal-setting and commitment).
- (v) *Looking to the future:* The aim of a concluding group discussion was to provide a platform for participants to 'co-consider' intervention design and delivery ideals and to share experiences.

Interviews and groups were all conducted in a conversational, semi-structured style and lasted between 60 and 90 minutes. All were audio-recorded. Topic guides were used flexibly in order to attend to retirees' personally pertinent topics (Hefferon & Gil-Rodriguez, 2011; Smith et al., 2012). The final interviews provided the core data for this particular analysis as it was during these that participants were invited to reflect on their longitudinal intervention experience and ways in which it 'made life better' (Lomas et al., 2014). The three-month gap between completing BPSG and these final interviews was aimed at shedding light on the sustainability of the intervention and was critical for exploring goal-stickiness (Duckworth et al., 2007).

### **Data collection**

Self-awareness was fundamental in handling researcher 'biographical presence' (Smith, 2004, p.45) as she 'changed hats' between

researcher–practitioner, interviewer–facilitator and academic researcher. As an experimental approach, any conflicts and decisions were noted in the researcher’s reflective journal, with the ‘personal analytic work done at each stage’ deemed key (Smith, 2004, p.40).

Full reflexivity spanned the analysis process and attention was paid to how the researcher’s own values and objectives might be impacting (Willig, 2001). Yardley’s validity principles (2000, 2008) of ‘sensitivity to context; commitment and rigour; transparency and coherence; and impact and importance’ (Hefferon & Gil-Rodriguez, 2011, p.758) were central to the approach.

The aim was for the study to move gently away from a traditional researcher-dominant style which might be at risk of confirmation bias. Wong (2017) proposes that collaborative methodologies can potentially improve study validity and reliability, and are ‘probably the most promising way to understand complex human phenomena such as meaning and wellbeing’ (p.5).

### Data analysis

Deep familiarisation with the final interview transcripts, including line-by-line noting of micro-themes, was followed by further organisation of themes, building eventually towards clusters of superordinate themes. The approach was re-iterative and inductive, with the researcher forming theoretical links only after full textual analysis (Smith et al., 2012). Participant journals were used to deepen idiographic understanding. The researcher took care to not favour the more articulate or emotionally insightful participants (Hefferon et al., 2017).

In terms of the synthesised methodology, as a separate but inevitably interwoven process and based on the concept of triangulation in action research analysis (McNiff & Whitehead, 2010), evidence was taken from across a range of perspectives to help shape the future process and delivery ideals of BPSG. This included output from each participant, interview and group findings, and reflexive journal learnings. Based on triangulation, the

dataset was further searched and analysed in order to unravel learnings about how the intervention might best be delivered in future.

## Results

### Contextualising the sample

Alongside the pleasures of not working, retirees also expressed a gentle existential angst based largely on how to manage the freedom of retirement, its impact on identity and, overall, the question of how to feel more fully at ease with it and themselves:

*I really felt I was drifting a little bit. I didn't want to. I know some people are happy to do nothing but actually I'm not.* (Alice, p.8, 223–224)

*Mmm, you feel like you're no good to anyone... I'm just me; living.* (Sarah, p.12, 360)

*I'm just a 'blob'.* (Sarah, p.13, 367)

*There isn't a structure or routine, so [it relies on] having the self-discipline to get out of bed and make stuff happen and that, for me, is the main challenge.* (Kelly, p.3, 78–79)

Participants alluded to intermittent struggles to fully relax into their freedom – referencing an unsettling feeling of a lack of deservedness, or an underlying guilt even – particularly in relation to the more hedonic life pleasures.

From the analysis, the researcher inferred that BPSG contributed to retirement wellbeing by increasing eudaimonic (meaning-related) factors, facilitating an improved hedonic-eudaimonic balance overall.

BPSG intervention themes are:

- Meaning-making and retirement ease – ‘I’m in a better place’.
  - Greater purpose and self-efficacy.
- Heightened self-awareness – ‘It’s okay to die now’.
  - Mortality awareness towards acceptance.
- Identification of self-concordant goals – ‘I’d just be me’.
  - Responsibility and progress.

### **Meaning-making and retirement ease...**

#### ***I'm in a better place'***

Following the intervention, participants described greater feelings of retirement ease; their guilt or inability to truly enjoy appeared diminished and they exhibited confidence and vitality:

*I'm in a better place because I haven't had a plan before and maybe that's why the retirement thing... the guilt... because there was never any plan. (p.3, 77-78)*

This shift was largely associated with an increase in personal meaning – associated with eudaimonia – a broad theme inferred in all interviews and pervading the research more generally. Via expressive writing and reflective journaling, each retiree established a powerful, future-led narrative which bolstered their identity, drove action and pointed towards increased fulfilment:

*Like in American movies you see granny who's the matriarch of the house and she's this loving, wonderful person everybody loves and she has words of wisdom, and I suppose I'm vaguely picturing myself as that but with a bit more 'oomph'. (p.3, 74-75)*

Notably, this particular visual imagery and associated emotional state remained influential three months later:

*I'm still looking forward to my 80th birthday party, everyone's going to love me. [...] I've got to get my mind in that nice peaceful place. (p.3, 68-69)*

Insightful personal narratives led to associated meta-goals such as 'happiness' (through relationships), 'health' and 'wisdom':

*I'm happiest when I'm with loads of people who like me and I like them and I suppose that's my best self [...] my buzz. (p.3, 90-91)*

*One of the main things that changed [during the intervention] (p.4, 84)*

*...the prime goal has got to be health. (p.4, 86)*

*I want to be someone who is able to make the best of whatever that future might be'. (p.8, 246-247)*

Starting to pursue what really mattered to them personally provided focus and pointed the way towards increased meaning:

*My goal [is] not to be rich, not to be this, not to be that, but my goal is to be liked... (p.7, 196-197)*

These shifts impacted on others in their lives too, opening up conversations or positively influencing behaviours and outcomes, bringing greater fulfilment.

Overall, they highlight positive new cognitions and describe gentle emotional shifts:

*[I'm] thinking more positively – things I can do rather than not. (p.13, 366-367)*

*[I have] a kind of inner smile. (p.3, 85)*

### **Greater purpose and self-efficacy**

In association with their meaning-making, each expressed greater purpose and increased self-efficacy. Self-efficacy is 'the core belief that one has the power to effect changes by one's actions' (Bandura, 2006, p.170).

In response to her unfulfilling sense of 'drifting', Alice achieved numerous goals (including finding volunteer work) and coached herself towards new ones. A sense of purpose was pervading her everyday activities and bringing greater pleasure to her retirement freedoms:

*It's [the intervention] made me think about doing things more purposefully. (p.15, 405)... If I can look back and say, 'look, that's what I achieved this week' then I feel better. (p.15, 412)*

Away from the formless 'blob'-like identity she described in relation to retirement, Sarah instead reflected powerful



visual imagery of herself as a well-loved, wise ‘matriarch’ and calm, Buddha-like figure. This new purpose and sense-of-self was influencing her daily actions and increasing her self-regulation:

*I have a purpose [...] it has made me think, ‘Well, this is how I want to be when I’m 80, so how do I put that into action’, so it’s given me a plan. (p.7, 206–208)*

For Kelly, in her retirement ‘honeymoon period’, BPSG gave her confidence that she was on track as she gained feelings of validation and gratitude by choosing to look back as well as forward:

*Whatever I choose to do now, if I want to do it, I ought to be able to do it. (p.6, 175)*

Respecting idiographic difference, the experiences of the three participants differed in relation to the time they had spent in retirement. For Sarah and Alice (18+ months retired) ‘it was quite a good time to think about the future’ (p.14, 377) as they felt ‘over the kind of novelty of it’ (p.8, 222). Kelly, on the other hand, at less than six months retired, wasn’t driven by any particular need for change. This permeated her experience, from writing style through to goals, yet the intervention’s innate flexibility supported (softer) wellbeing outcomes for her too.

### **Heightened self-awareness...**

#### **‘It’s ok to die now’**

All reported increased self-awareness:

*Things that surprised me that clearly kept coming through [in my writing] as being important, but if you’d actually asked me if it was important, it wouldn’t have come immediately to mind. (p.6, 158–159)*

There was insight too about the usefulness of exploring their desires and motives.

Two participants ascribed the depth of personal revelation during the intervention

to their particular writing approach, which elicited less top-of-mind and, at times, less palatable thoughts:

*I just started writing and it was just a load of rubbish – like I talk – just wittering away really. [...] I would have been more structured if I hadn’t have written it down, and more structured means not so honest. (p.11, 334–335)*

Despite the future-focus of BPSG, the past emerged in some form for each participant, and a longing for what had gone became a goal for one participant:

*That gay abandon, I’ve lost that sadly over the years... but I’d like to have that [back]. (p.8, 227)*

For others, reflecting on past achievements brought reassurance for moving forward:

*[My] personal qualities... they are a continuum. (p.9, 264)*

For those in a relationship, it seemed a natural (if slightly unnerving) part of the intervention process to consider – at least briefly – how retirement might be different without their partner. Associated insights may even prompt brave new conversations:

*Maybe that’s something [my partner and I] need to look at. (p.8, 200)*

This dance across time and alternative realities builds self-awareness and paves a route towards acceptance.

### **Mortality awareness towards acceptance**

All participants reported a powerful connection between the move into retirement and a parallel acknowledgement of loss, ageing and, beyond it, death:

*I’ve never really thought of it but I suppose I am aware of how old I am now [I’m retired]. (p.10, 284)*

BPSG's 'Imagine your 80th birthday party instruction' (Appendix 1) brought mortality awareness into sharp focus, eliciting powerful dialectical writing and imagery. For example, contrasting in the same piece of writing, a fear of death, I wrote, 'I don't think I'll be here' (p.6, 212) with the celebratory clinking of glasses and chatter of friends. This complexity of emotion fed into the heart of subsequent goal-setting and even led to a feeling of mortality acceptance for one participant:

*Almost like going to my funeral but a jolly one [...] like 'this is my life', who I've ended up being' (p.8, 214)... And I thought, 'It's ok to die now'. (p.7, 193)*

A sense of increased global acceptance (e.g. of self) was also evidenced, for example, in a greater appreciation of the now and in rational reappraisals of self and circumstance:

*Actually, I realise I'm ok as I am. (p.5, 152)*

### **Identification of self-concordant goals...**

#### ***I'd just be me***

Participants internalised their BPS-inspired goals which attracted ongoing effort for the three-month period of the project (and beyond, they planned).

*I like [my goals] and I think they're positive (p.13, 282)... You've actually just got to keep going at it. (p.13, 285)*

With goals achieved, others carefully revised and new habits forming:

*I've achieved certainly three of them. I mean one of them I've ditched (p.10, 277)... I've thought a bit more carefully about what I was doing'. (p.10, 284)*

*I'm more ready to smile and actually it becomes easier. (p.1, 11)*

Goals emerged as personally meaningful and they reported approaching them differently

– often with greater motivation and success than previous attempts:

*Writing it down did make me feel quite committed to it and actually it went quite well... actually I felt that for me was an important one 'cos it's something for me that's been hovering about for ages. (p.1, 21–22)*

Further analysing participant language around goals suggests that BPSG enabled them to re-engage with what they already felt (consciously or less so) to be important:

*I might have thought to myself before, 'Why don't I say hi to these people?'... so this [intervention] has sort of centred it... like, I've got to start trying these things. (p.10, 298–299)*

*[I'm doing] the things that were in the back of my mind. (p.10, 275)*

### **Responsibility and progress**

Each took responsibility for their goals and, via ongoing action and reflection, they progressed, learnt from and revised their approaches.

Following on from goal successes, one participant described her unprompted method of self-coaching.

*[I would consider] how I was approaching the goals. What was I achieving or what did I need to do (p.10, 137) so that when that goal is achieved, set another one within the same kind of area. (p.12, 343)*

Another demonstrated a cognitive behavioural self-coaching style to tackle personal fears around shyness:

*Like having a phobia maybe. Whereas I'm realising that it's not that bad (p.4, 96)... I am joining in more conversations... I would have just sort of listened before, so that's more positive. (p.1, 27)*

*All claimed to be in 'a better place' post-intervention. (p.3, 65)*

## Discussion and limitations

The aim of this study was to reveal the idiographic experiences of retirees participating in the targeted intervention and examine its perceived utility in addressing retirement wellbeing. With key emergent themes of ‘meaning-making and retirement ease’, ‘heightened self-awareness’ and ‘identification of self-concordant goals’, participants perceived that BPSG did have a role to play at this change of lifestage.

On holistic analysis of participant themes, it seems evident that BPSG contributed to retirement wellbeing principally by boosting eudaimonic (or meaning-related) factors, which are shown to decrease with age (Ryff, 2014). Increases in a number of eudaimonic factors (such as self-awareness, purpose in life and intrinsic goal progress) appeared to facilitate a more balanced hedonic-eudaimonic wellbeing and a global wellbeing increase overall.

For the purposes of this discussion, ‘eudaimonia’ and ‘meaning’ are considered broadly similar and are referenced interchangeably. This is in line with Wong’s proposition (2011) that a meaning-orientation equates to eudaimonia, and with Huta and Waterman’s (2013) terminology study, which highlights meaning as one of the most common factors amongst eudaimonia’s somewhat tangled definitions.

Given the interconnected nature of participants’ inducted themes, the intention here is to discuss their experiences relatively holistically and to allow themes to sit together as appropriate. The discussion begins with the topics of meaning and purpose, deemed to lie at the heart of the intervention experience.

Overall, this section will shed light on the longer-term eudaimonic potential of BPSG, away from the short-term positive affect outcomes traditionally researched in expressive writing interventions. It will also complement the small body of PP/CP retirement literature, whilst exploring the broader benefits of the specifically-tailored intervention. It concludes with a review of opportunities for the further development of BPSG.

## Meaning and purpose (re-balancing hedonia and eudaimonia)

Participants reported progress towards retirement wellbeing which spanned their cognitions, actions and emotions. This triumvirate of elements is consistent with those proposed in Wong’s theory of meaning (1998). Expressive writing and reflective journaling supported the ‘cognition’ element, eliciting personal narratives and retirement philosophies which inspired participants in a cognitively meaningful way. Goal-setting underpinned the ‘action’ component, whereby meta- and sub-goals which had materialised through their writing, motivated their subsequent behaviours. Participants described feeling more purposeful.

Finally, following on from this alignment of ‘cognition’ and ‘action’, participants’ ‘emotion’ built to produce a global experience of meaning. This was evident in their descriptions of a sense of fulfilment and greater feelings of ‘ease’, an ‘inner smile’ or simply the feeling of being more at one with themselves. Therefore, the findings from the current study are consistent with Wong (1998).

Participants’ accounts of a post-intervention uplift in meaning were accompanied by an increased comfort with their retirement freedoms and pleasures, bringing an improved daily experience overall (i.e. a eudaimonic shift towards greater meaning also appeared to increase their pleasure in life – or hedonia. In line with Huta’s theory (2015), it seems that rebalancing eudaimonia also benefits hedonia; the two are known to complement one another and it’s reasoned to be difficult to fully pursue or accept hedonic activity without feeling deserving of it. According to Anic and Tonicic (2013), those who pursue both eudaimonia and hedonia have better wellbeing outcomes than those focused on either one or the other. These findings are particularly salient in the context of retirement, given the circumstantial shift towards hedonia, and indeed, in the light of participants’ reported discomfort with this prior to the intervention.

Deep re-engagement with the self through expressive writing and subsequent goal-oriented behaviours each played a role in participants' meaning-centred wellbeing uplift. This is in agreement with Lyubomirsky, Sousa and Dickerhof (2006), who found that a bolstered awareness of self and of possible futures through writing can help with the process of meaning creation. It concurs too with Kohut's (1977) theory that a sense of equilibrium and meaning – via goals and ideals – can act as a stabilising force in life transitions. Meaning can also help clarify one's approach to life, prompting enduring goal-commitment and a motivation towards self-care (Klinger, 2012), as evident, for example, in participants' deepened personal health goals.

Meaning in life has been correlated with psychological adjustment, hope and vitality (Steger, 2012; Thompson et al., 2003), all of which are particularly pertinent for wellbeing at a time of change (such as retirement) and are echoed by this study's findings. Personal meaning can change across the life-course and particularly in relation to a shift in lifestyle (Prager, 1996). With meaning a key factor in human flourishing (see Ryff's psychological wellbeing theory (1989) and Seligman's PERMA model (2012)), it seems that BPSG may be a useful tool for re-engaging with one's authentic self and linking this with goals in order to smooth the passage into retirement. To our knowledge, there have been no PPIs specifically aimed at this freshly-retired population and the learnings here suggest that BPSG challenges head-on some of the specific issues of retirement. Additionally, given the inherently personal nature of writing one's future and the flexibility of subsequent goal-setting and revising, BPSG seems to offer person-fit, intrinsic motivation and ongoing variety – and thus, unlike many interventions, sits well with the hedonic adaptation prevention model (Sheldon et al., 2012). Research is required to further explore its retirement benefits (e.g. adjustment and transitioning), as well as further longitudinal outcomes (e.g. happiness and flourishing).

### ***Self-efficacy***

Perceived self-efficacy is a belief in one's own abilities (Bandura, 1982), and thus lies at the heart of goal pursuit. Participants' increased self-efficacy was likely a combination of cognitive re-engagement with their values and goals, alongside a positive mood uplift as a reflection of their goal successes. This is in line with Bandura's theory and research (2006). Likewise, findings concur with Maddux's theory (2009) that an additional route to self-efficacy is via 'imaginal experiences' – or the ability to visualise oneself behaving successfully. Participants who engaged deeply with the expressive writing component of BPSG were most influenced by visualisations of self-efficacy.

Concurring with Bandura's research (1989), retirees' attitudes were optimistic and self-enhancing, positively shaping their outcomes such as finding voluntary work and improving health behaviours. Research indicates that self-efficacy is a key contributor to emotional wellbeing, motivation and performance (Maddux & Kleiman, 2012) and it's also associated with lowered stress reactions, increased self-regulation and better coping behaviours (Bandura, 1982). With perceived self-efficacy diminishing in older adulthood, this may be particularly helpful for retirees to maintain quality of psychological functioning. Further research is needed to explore this topic in more detail.

### ***Heightened self-awareness***

As King (2001) points out, writing about one's life goals provides the occasion to learn about oneself, and this was borne out by the intervention. A more coherent sense of self – away from any niggling retirement identity issues – emerged through retirees' narratives, with their prized narrative 'endings' (e.g. adored granny Buddha) helping to direct choices towards fulfilment (through meaning). Overall – and in line with Drake (2007) – this brought improved feelings of personal alignment across 'identities, stories and actions in the direction of their goals' (p.289). Indeed, telling one's story is a way of

exploring personal meaning and refashioning one's identity over time (Csikszentmihalyi, 1996; McAdams, 2001).

Unlike the more 'mainstream' past-focused narrative interventions for older people, such as reminiscence activities (Cook, 1998), what BPSG achieves is to direct retirees' personal narratives towards the future, whilst also bringing the present into sharp focus and enabling contemplation of the past via journalling. Maintaining a broadly healthy balance across all time perspectives in this way is shown to be most significantly linked to positive wellbeing, whilst the intervention's principal future-orientation has positive links to optimism and hope (Bonniwell & Zimbardo, 2015).

Overall, expressive writing can bring a host of wellbeing benefits, including emotional adjustment and positive psychological functioning (Frattaroli, 2006; King, 2001) as evidenced in participants' increased self-awareness, self-regulation and cognitive-behavioural modifications. BPSG thus offers something new and relevant for retirees at a time of significant change and refocused priorities.

### ***Mortality awareness towards acceptance***

The immediate uplift in positive affect found in previous BPS writing studies (King, 2001; Layous et al., 2011; Sheldon & Lyubomirsky, 2006) was not echoed in this revised intervention which gave a more complex affect picture overall. With existential concerns such as loss, illness and death feeling rather closer in retirement, the concept of 'possible selves' is less straightforward.

In particular, BPSG's 'Imagine your 80th birthday party' writing was initially upsetting for some. Death is a difficult subject for our 'death-denying' society (Wong & Tomer, 2011); yet it is such challenging subjects which are key to the beneficial outcomes of writing (King, 2001). The rich imagery and intrinsic goal-setting emerging for participants during this study indeed suggests that this was the case. Alongside discomfort, there is apparent value in what

Yalom (2008) might refer to as a (mini) 'awakening experience' created by the 80th birthday instruction.

Other research has also shown the potential benefits of the 'negative', including how death might influence us (Wong, 2011). Cozzolino's empirical and theoretical work (2006) on death contemplation, highlights that personalised death reflection can firmly direct individuals towards their intrinsic goals and needs; and that a death-prompted self-focus delivers goals which are better-aligned with personal strengths, making them more achievable. This was borne out here, with retirees ultimately energised by the discomfort of the 'negative'. They appeared better able to prioritise opportunities and to focus their attentions towards what emerged as personally important. BPSG seemed to cut through some of the 'noise' around the (sometimes intimidating) new-found freedoms of retirement.

Moving from death denial to acceptance (explicitly experienced by one participant) can help reduce existential anxiety and increase meaning in life (Ivtzan et al., 2016). With retirement an uncomfortable reminder of ageing and death, this would seem an appropriate moment to engage with the subject perhaps. Indeed, existential concerns and other 'negative' (retirement) emotions such as frustration and guilt were shown to motivate participants towards meaningful change. Distinct from the majority of PPIs – and in line with PP 2.0 (Wong, 2011) – the flexible and personal nature of BPSG provided a space for difficult emotions too. Further exploration of the pros and cons of prompting potentially complex existential thoughts is necessary in order to balance the direction of BPSG and to ensure that it's effective but also safe for participants.

General feelings of acceptance (relating to self, others and circumstance) emerged during the study too. Wong (2013) highlights the adaptive value of acceptance and signposts it as a potent start-point for positive change, with authenticity and eudaimonia as

pathways towards it. Acceptance is an interesting outcome too and warrants further research amongst this retiree lifestage, for whom it might be particularly relevant in terms of providing a solid platform for ongoing positive ageing.

### ***Self-concordance and goal progress***

Whilst it's difficult to fully identify goal self-concordance, as it is by nature 'subtle and shifting' (Sheldon & Elliot, 1999; p.495), participants' experiences point firmly in this direction. Specifically, their use of language revealed an internalisation of goals and highlighted an easy marriage between these and their personal values (Sheldon & Houser-Marko, 2001). Their behaviours too echoed a similar sense of ownership and commitment, with ongoing personal effort leading to more satisfying day-to-day experiences, in line with Sheldon and Elliot's self-concordance model (1999). A further benefit of self-concordance is that of deeper feelings of relatedness to others (Sheldon & Kasser, 1998), which was also borne out here. This targeted BPSG intervention represents the first time that goal-setting has been linked with BPS writing and the findings are powerful in terms of apparently enabling self-concordant goal outcomes. A larger scale mixed-methods project specifically considering measures of self-concordance would be really valuable.

Inherently flexible and personal, BPSG was relatively successful in becoming integrated into participants' everyday lives and avoiding hedonic adaptation. Previous research has indicated that interventions need to attract such ongoing attention for sustained wellbeing after the initial boost (Lyubomirsky et al., 2005). Interestingly, two participants even reported spontaneous forms of self-coaching during the course of the intervention, triggering ongoing engagement with – and revision of – their goals. This is of potential value because repetitive goal cycles have been shown by Sheldon and Houser-Marko (2001) to promote an upward spiral of healthy goal-striving. Might such

recurrent cycles stimulate ongoing behavioural tweaks to keep retirees' (seemingly threatened) eudaimonic–hedonic equilibrium optimised over time?

Overall, BPSG is perhaps less about goal-attainment than it is the more holistic gains in meaning and purpose as a result of combining BPS expressive writing, goal-setting and journal writing – supporting the cognition–action–emotion triumvirate of Wong's theory of meaning (1998) – and helping to rebalance participants' off-kilter eudaimonic-hedonic wellbeing. As an apparent aid towards often elusive self-concordant goals, it merits further research across broader populations too.

### ***BPSG development opportunities***

As part of the participatory action research methodology and in order to get closer to giving retirees the best-fit wellbeing tool for them, we conducted participant discussions around BPSG ideals. Further research is required, but the initial consideration is for local community groups to organise new-retiree meet-ups, using BPSG as the backbone for a self-guided group process. A group setting would help counter the abrupt absence of work-related social contact whilst enabling peer-support and the growth of organic friendships. Social support is deemed key at a time of transition (Pettitt & Kwast, 2017) and the sharing of goals with others is instrumental in maintaining goal-striving (Shteynberg & Galinsky, 2011). Participants imagine it providing a start-point for a mutually supportive community experience. Where resources allow, they propose that sessions might be expert-led, at least initially.

An expert-led model might empower retirees with a broader set of wellbeing tools, maximising person-activity fit by offering choice. Although we have questioned the convention of past-orientated interventions, some may feel more inclined towards these.

Considering the broader BPSG development opportunities, these might variously include: a simple online (or print)

self-guided format based on the current design; an upgraded online version including virtual coaching and an online support group; integration into a self-guided community retirement group (e.g. U3A or local book-club style); or an expert-led community group offering additional PPIs.

Developing the concept further, it might form part of a one-to-one or group coaching programme (e.g. via local authorities, social enterprise, HR departments or practitioner-led) or perhaps get redesigned into a more elaborate retirement programme with additional wellbeing tools, theories and inspirational content (e.g. akin to the Action for Happiness course (Action for Happiness, n.d.)).

Obviously there are cost and benefit implications of each and further research is required to establish where the balance best lies.

### **Limitations**

With a homogeneous sample and a detailed idiographic approach, this study brings texture and nuance to previous research on the topic of BPS expressive writing and provides preliminary findings regarding the relationship between BPS and self-concordant goals. Output may be of value to those engaged with the retirement community and starts to shed light too on how PP and CP might provide supportive tools for those in the early stages of retirement.

Whilst a rich study, the high degree of 'novelty' across the research (methodology, population and intervention) is perhaps challenging and the study output thus more diverse and less intensely focused than it might otherwise be. Replicability might also prove less simple, but a fully documented research pack is available. Certainly, in the absence of a synthesised methodological protocol, the researcher employed maximum reflexivity and a rigorous analysis approach.

The recruitment method means that participants self-selected and likely comprised those more naturally-inclined towards an expressive writing intervention. The find-

ings may therefore not apply to those who, for example, find writing burdensome – or indeed for the 16 per cent of British adults deemed functionally illiterate (Department for Business, Innovation and Skills, 2011). By its nature too, this initial qualitative sampling lacks ethnic and socio-economic diversity, which would need to be addressed in subsequent studies.

Findings are not aimed at generalisation, but can instead inform future bottom-up research. The combined intervention's emergent themes indicate some interesting divergence from BPS' short-term positive affect findings, pointing instead towards long-term eudaimonic outcomes.

Finally, it is noteworthy that the research conditions are deemed to have increased the intervention's efficacy, with the qualitative design meaning that participants also had the opportunity to verbally share their written goals, boosting feelings of accountability and likely prompting greater responsibility towards the project overall. Thus, whilst findings suggest that BPSG has value as a group intervention or face-to-face coaching tool, its efficacy in a fully self-administered format (e.g. online) is less clear.

### **Implications for future research**

With retirees an under-researched population in human flourishing, and BPSG a newly combined intervention, there is certainly scope for additional research learnings. It is recommended that preliminary idiographic learnings inform a larger, macro-level study – perhaps via a mixed methods approach – to further elucidate and validate current findings.

Further research would also be required to specifically explore BPSG as an online self-administered tool – this route would ideally remain a key focus as it enables cheapest and broadest reach, democratising CP/PP interventions. Nonetheless, given the recognised risk of social isolation in retirement (Pettitt & Kwast, 2017), a group format is contextually well-founded. On that basis, future research would also

ideally trial BPSG in a group or community format. Indeed, whilst expressive writing research amongst students found equal positive affect outcomes online as in-person (Layous et al., 2011), numerous studies also show that social support leads to larger wellbeing increases (e.g. Diener et al., 2006) and this was certainly echoed in participants' clear preference for a group intervention. At the micro level, further research is required to more fully understand the contribution of mortality awareness to the intervention. We note too that care must be taken to exclude clinical populations or those who, in general, may lack positive feelings in respect of their future selves. Relevant amendments to the recruitment criteria are required.

## Conclusion

Initial research seems to uphold Ken Sheldon's prediction (personal communication, 2016) that BPS expressive writing may lead to self-concordant (i.e. wellbeing maximising) goals. Whilst the intervention was designed for and appears beneficial to the retirement community, this link to optimal functioning via self-concordance suggests a much broader applicability and it is likely to be of interest to individuals, educators, businesses and practitioners alike. Practitioner-researchers might therefore consider further modifications to BPSG's instructions in order to build its contextual relevance for alternative populations. With potential across diverse delivery formats too – from online to more

heavily-resourced – it's hoped that these preliminary findings might spark creative engagement and dynamic research across multiple populations. For those transitioning into retirement or 'post-career life', it is recommended that further research establishes an appropriate framework for BPSG delivery in order to support them towards their new freedoms and flourishing.

'We become the stories that we tell ourselves. Write yours with passion and joy...'  
(Minarik, 2012).

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## Acknowledgements

The following academic experts helped not only to inspire this piece of research, but also readily assisted by responding so generously to unsolicited e-mails:

Professor Jonathan A. Smith, Birkbeck University, who provided sound advice in constructing the synthesised methodological approach. Professor Ken Sheldon, University of Missouri, who gave encouragement for creating the combined intervention. Associate Professor Chiara Ruini, University of Bologna, for sharing her exciting Lighten Up! project. Of course this study would not have been possible without the research participants who so generously gave of their time and energy; it was a pleasure to spend time with each of them.

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## Appendix 1

### **BPSG, part 1 – Daily writing instructions**

**Day 1** – Describe your best retired self, imagining all your dreams have come to fruition.

**Day 2** – Explore the key building blocks of your life at their future best (home, family, community, leisure, learning, volunteering, etc.)

**Day 3** – Imagining that everything has gone to plan, write specifically about how things look in five years' time.

**Day 4** – Envisage that everything has turned out as you would like and now write from the perspective of your own birthday party aged 80 (think about how it looks, feels, smells, sounds; who's there with you – people you already know and those you may not yet have met).

## Appendix 2

### **BSPG, part 2 – Goal-setting think sheet**

Goal statement (describe the goal – what exactly it is you would like to accomplish)?

Highlight the day or days on which this goal appeared in your writing?

Day 1   Day 2   Day 3   Day 4

Who's the goal for (yourself or others and why)?

Why you chose this goal and why it feels important?

What you need to do to move towards or accomplish this goal?

How will you know when you've got there (what will be different?)?

By when will you reach the goal?

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