



Personal Mastery

BY SUE

ELIZABETH CASSON TRUST 

Personal Mastery

Welcome to this brief exploration of the Personal Mastery of Retirement, which considers how we can manage, with panache, the first stage (and beyond) of leaving the world of work.

Personal mastery implies a state of adeptness or skill in an occupation (activity, task, state or purpose). It's the pragmatic ability to carry out a physical and/or cognitive task; to understand and develop a concept and apply it to our own situation; the art of feeling confident and having the competence required to be able to replicate the process and to explain why it works (for us). Personal mastery comes from understanding the explicit and implicit forces which influence our decisions, and how we value them.

Retirement offers an opportunity to bring together all our lived experiences and life skills, complemented with our professional skills, for the ultimate goal of meeting our own needs in retirement. Despite our disparate interests, retirement is a time in which we all have commonality, in that it is one of life's later transitions (See: Transitioning into retirement). The personal mastery we utilise in achieving a semblance of satisfaction may hide a complex web of conversations, negotiations and thoughts. My retirement is not yours, but together we can share our experiences.

This pocket guide offers no magic spell or golden ticket, but it comes from the wealth of experiences of many occupational therapists who have moved along the path from work to retirement. Making it a positive experience is important, but there is also an appreciation in this pocket guide that it may not be a smooth process, nor live up to our expectations. Even so, the insights we gain about ourselves (and others) add to our lived experiences and can help to formulate a new path or outcome which satisfies our personal needs.

Those who aren't occupational therapists are welcome here too. We hope this guide will give you support in navigating your own journey.

Remember, the journey is just as important as arriving!

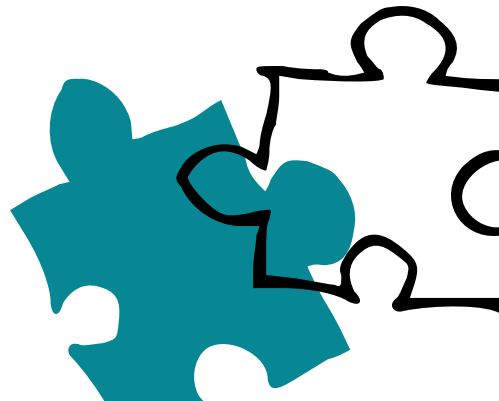
GATEWAYS TO RETIREMENT

Not everyone enters retirement through the same gateway (See: *Transitioning into retirement*). Take a look at some of the different ways we may enter retirement:

Choosing to retire: Once we choose to retire we begin a new transition, which can challenge some of our own beliefs and perceptions. We can either take a leap of faith, accepting and embracing all that befalls us, or walk with a swagger, believing that we 'have it sussed'.

Burnout: If we make a decision to leave due to burn-out, this can leave us with a nasty taste in the mouth and retirement may be seen as a panacea for our ills. Under these circumstances it is even more vital that we do not raise our expectations unduly, or rush into 'planning' our future (See: *Reasons for retiring: When plans don't work out*).

Unexpected retirement: Alternatively retirement may be thrust upon us. This can happen if we are made redundant, if our job changes or if we are faced with a situation over which we have no control over, such as ill-health. These circumstances give us limited opportunity to manage what happens and can be a difficult way to begin our retirement. (See: *Reasons for Retiring: When plans don't work out*)



A NEW BEGINNING

A) Reflection

Our new beginning may involve a great deal of reflection. Despite the different scenarios shown above, retirement often comes at the end of a planned process, which has included repeated reflections. Applauding what we have already achieved to date is a great starting point. We have achieved the portal to retirement. Now is the time to pat ourselves on the back and recognise that we have contributed to the lives of so many people, in so many ways.

PAUSE POINT

If your arrival at this point in your retirement process has felt harried and caused anxiety and discomfort, then rest here a while and take stock of what has happened and how you might move forward to optimise your future.

Tools for reflection

Reflection can be a powerful tool, it has formed a necessary part of our clinical expertise, and career development, and it can help us now. It may be a new term, but it echoes many of the opportunities we take throughout life when we need to take stock of what is going on in our lives.

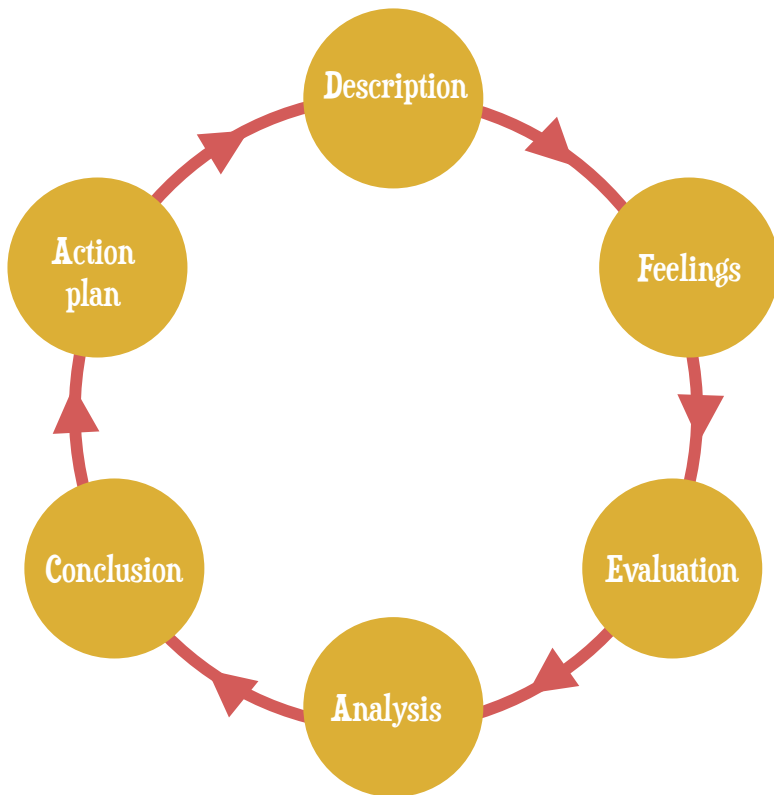
Here are some tools you can use for reflecting on how you are feeling as you read this pocket guide. It can help you list a few ideas about how you might wish to move forward.



GIBBS' REFLECTIVE CYCLE

[Gibbs' Reflective Cycle - Helping People Learn From Experience \(mindtools.com\)](http://www.mindtools.com).

You may be familiar with this tool. Although it is one of the more complex models of reflection, it may be that you find having multiple stages of the process to guide you reassuring. Gibb's cycle contains six stages. Try following them to see if they help you reflect on this stage in your retirement process. www.mindtools.com



Description: Describe what has happened

Feelings: How am I feeling about it?

Evaluation: Which factors were particularly pertinent?

Analysis: How can I make sense of them?

Conclusion: (Light bulb moment)!

Action plan: This is my plan

A 'TO DO' LIST

Perhaps, though, it feels more comfortable to have a **'To Do' List**.

What is important to me?			
	What do I want from this time?	What do I need to sustain myself?	What do I hope to achieve?
Practically			
Cognitively			
Socially			
Psychologically			
Spiritually			
Other			

By recognizing the task ahead of us, framing it in a positive way, whilst acknowledging feelings of uncertainty (which are very relevant), we can begin to unravel our feelings and correlate them into a clear focus. We are experts at drilling down to the important things in other people's lives, now is the time to use our expertise to explore our own needs, wants and desires.

B) Skills

So what skills do we need to build on our mastery of retirement?

Retirement courses tend to concentrate on finances: this implies that we have sufficient fiscal skills, and money to retire, although this may not be so. Plan your retirement income: Get help - GOV.UK (www.gov.uk) . (While finances are important this is an area of expertise we won't be covering in this guide).

In my experience they also have an almost insidious focus on volunteering and this implies that we have the resources (time, desire, will, capacity) to be able to volunteer. It also implies that volunteering is our only option! This is definitely NOT the only option, as can be seen in the Pre-Planning for Retirement section.

PAUSE POINT

Think about your own journey. Do you recognise the skills you already have and which skills, if any, would you like to further enhance or develop? If so, how could you go about this? And which resources would support you to achieve these skills?



Identifying your skills

What skills do you already possess?	What skills would you like to develop?	How will you achieve these skills?

The reality is, we may already have all the skills we need to achieve mastery of our retirement. This process may support you in working out the elements that you have and need to manage your retirement. As occupational therapists we are well-versed in understanding person-focused interventions, what matters to an individual and how to optimise all the parameters to support positive outcomes.

So how do we make these work to our advantage?

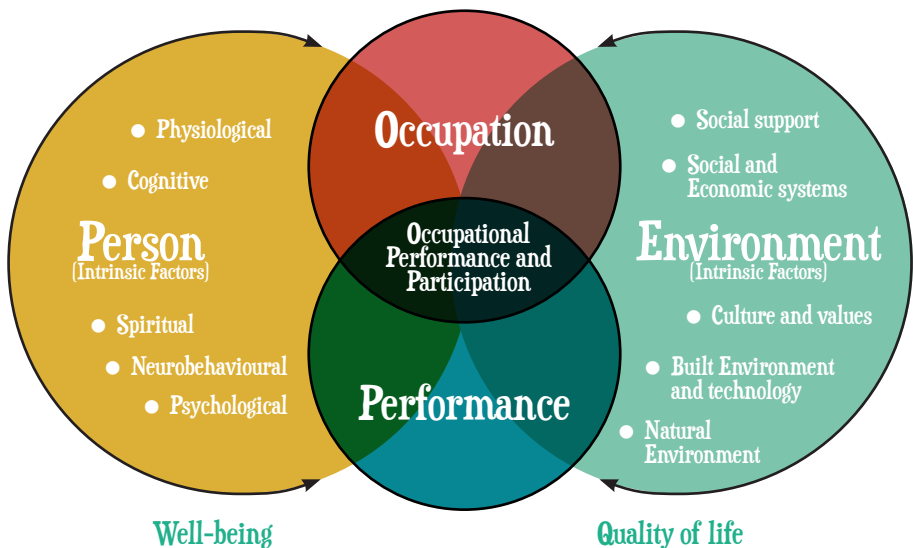
C) Identifying where you are now

By using occupational therapy models of practice

We can draw on models of occupational therapy as one of our tools to support our evaluation of the here and now, and as guidance for identifying our action plan. You may have used models in your practice - now is the time to try using them for analysing your own situation.

Utilising models of occupational therapy can provide insight into what we want from our retirement. The decisions we make will be influenced by many extrinsic and intrinsic factors. Take time to explore the model you are most familiar with and chose one of these to consider your situation.

i. The Person-Environment-Occupation-Performance (PEOP) model is a system model that views the function in the systems as a whole and considers the interaction among its components.



This model works in a more person-focussed way, than some of the other more medicalised models may. The following link gives you more information on this model:

1: The Person-Environment-Occupation-Performance model (PEOP) | Download Scientific Diagram (researchgate.net)

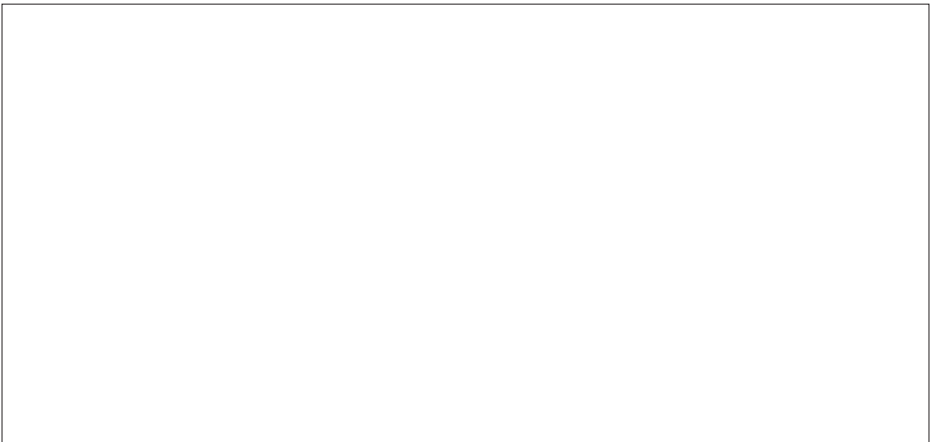
PAUSE POINT

Use this space to explore some of the Intrinsic Factors which are important to you:

For example, is spirituality, a sense of belonging, a need to use your brain important?

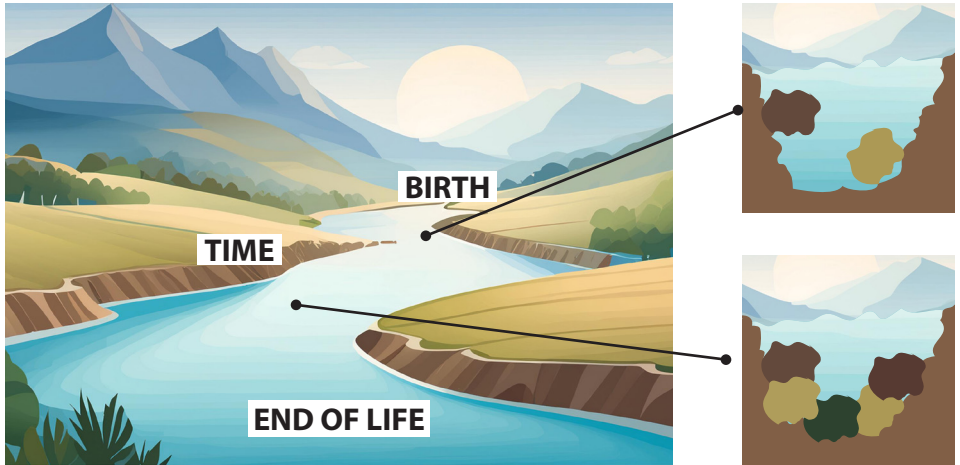


What Extrinsic Factors (in your life) influence your engagement with occupations (social support, culture and values, built environment and technology, natural environment, social and economic systems)?



Use these thoughts to help with your planning. What is important to you? What time do you have available? How busy do you want to be?

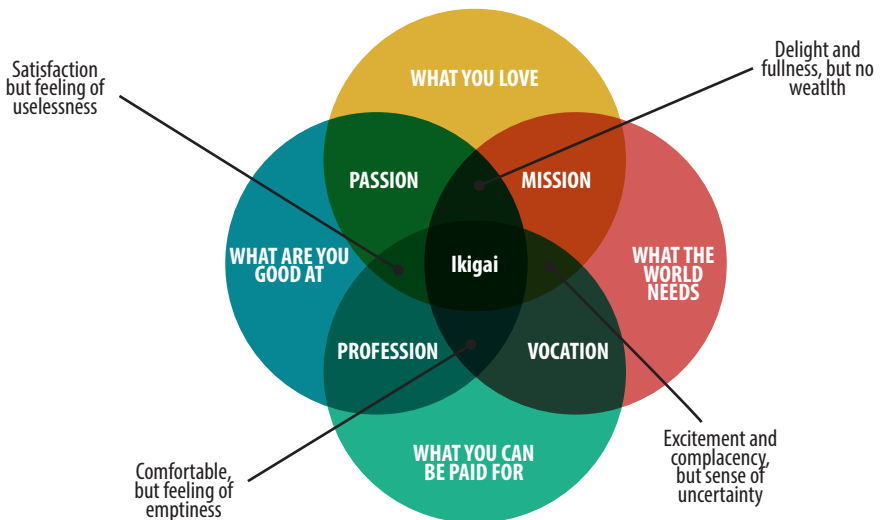
ii. Alternatively we may consider a pictorial option. Michael K Iwama developed the Kawa River Model which is a culturally agnostic occupational therapy model. i.e. a tool that guides thinking. (This link gives an opening to the www.kawamodel.com/v1/world/.)



PAUSE POINT

Here is space for you to try the Kawa tool. Being able to check back, as you progress through retirement may be a great way of reflecting on how you have navigated the process and how your personal mastery has changed.

iii. Those who are not occupational therapists may prefer the Japanese concept of Ikigai: "ikigai" means a "life purpose" or "raison d'être." "Ikigai refers to defining your personal meaning of life in relation to your talents, passions, and profession, as well as what you can give to the wider world". It is an interesting 'One World' model.



Even when we are no longer constrained by being in a work-centric environment, our lives could continue to be focussed on the 4 elements of ikigai, as a model for developing our 'new' life.

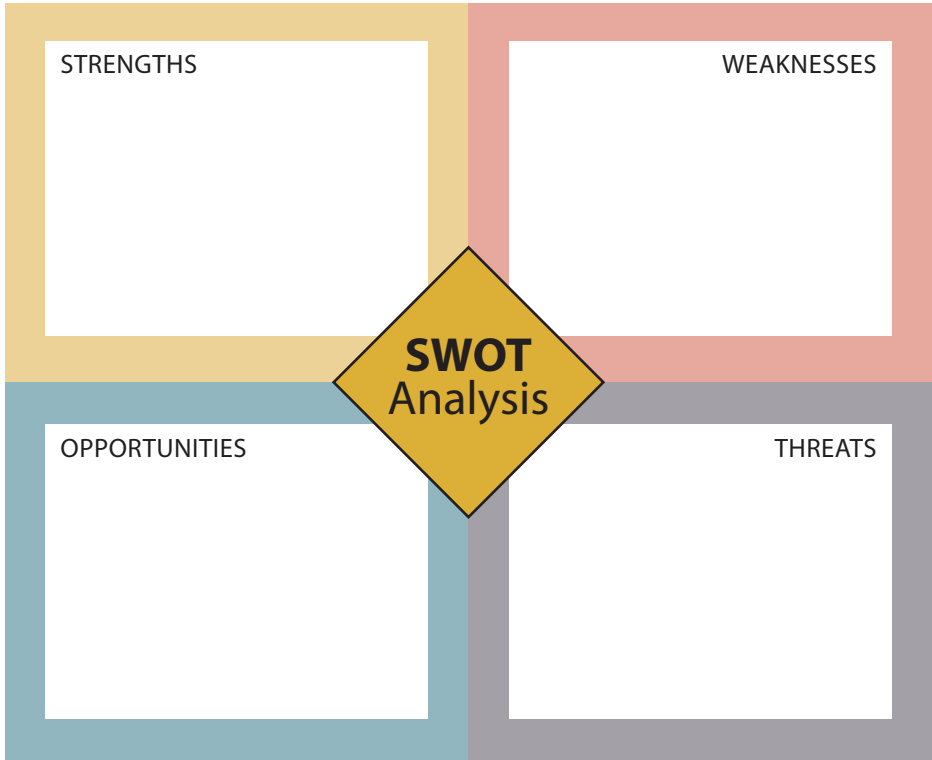
PAUSE POINT

Give thought to the petal-shape areas and What Matters to You? Is it possible to rank these in importance for you, and to work on ways to build on fulfilling them in your retirement?

What do I love?
What am I good at?
What can I be paid for (gain credit for)?
What does the world (or my personal world) need?

- **BY USING A SWOT ANALYSIS**

If your experience of models is limited, try a **SWOT analysis** of your current situation.



- **BY USING A BLOG OR VLOG**

One way of evaluating and analysing our thoughts may be to blog, or vlog. Look at this example from S about pre-planning her retirement:

Pre-planning for retirement

S began to blog as a way of reflecting on how retirement might look for her. She made a conscious decision to take early retirement, and was certain that she wanted to remain an occupational therapist, but not to remain a tenured employee. Her blog gave her the opportunity to explore different scenarios, and also to determine which skills she was bringing from her professional life, into use in her post-work life and volunteering roles. S considers she is semi-retired but her passion for elements of her occupational therapy career have focussed her interests, and she now works freelance on a very part-time, and ad hoc basis in student placement supervision.

S's blogging can be read [here](#).

- **CHANGING FOCUS**

Moving into retirement with rapidity!

H decided to step straight into early retirement from her NHS career, without spending time pre-planning. Being aware of the lack of guidance on retiring from the NHS, H has advocated for her retired peers, analysing the process, whilst working to support and guide others in mastering the early stages of retirement. H has been involved in student education as a virtual patient. He is now working on an MSc.

Taking skills with you

J used art as a treatment medium in her clinical practice. When considering retirement she knew that the group she had founded would continue to be a constant within her transition. Even when taking a few months to decide what she wanted to do, the group continued running with J at the helm, as trustee, co-ordinator and lynch-pin. After several years, the group continues to provide a safe space for contemplation and creativity with J quietly providing her skill to the organisation. It's now part of the social prescribing foundation and was invaluable to its members in post-lockdown life.

A TEST OF FAITH

We are virtuosos of our own lives, what matters to us may not correlate to anyone else's expectations for, or of, our retirement. We are fortunate indeed if we can follow our dreams and plans, though this isn't always the case. (See: ***The Myth of Retirement***)

The terminology around retirement can sometimes be negative, but as consummate professionals we do ourselves a disservice by not framing our experiences in a positive way. As we develop our personal mastery of retirement, remember we are in control of most of the elements. We can optimise those over which we have limited control and endeavour to minimise the impact they have on our success as retirees. Of course, each of us will have a different opinion on, or understanding of success!

This is our time to explore our own 'reason for being'. We have no knowledge of the duration of this stage in our lives, so the skills we use to create the atmosphere and timbre of retirement, will sustain us, and our physical, cognitive and psychological well-being for the journey. The value gained from being skilled, insightful and reflective practitioners will sustain and support our life as a retired person.

This pocket guide recognises that we are living this together, and can gain support from sharing our experiences.

REFERENCES/RESOURCES

[Gibbs' Reflective Cycle - Helping People Learn From Experience \(mindtools.com\)](https://www.mindtools.com/pages/newbystr/gibbs.html)

[Person-Environment-Occupation-Performance model \(PEOP\) | OT Theory](https://www.kawamodel.com/v1/)

<https://www.kawamodel.com/v1/>

https://positivepsychology.com/ikigai

[SWOT Analysis | Factsheets | CIPD](#)

[Unfinished? – therapy2optimum \(wordpress.com\)](https://www.therapy2optimum.com/unfinished/)