

# Retirement Transition of Educators and Administrators in Laguna State Polytechnic University (LSPU): A Phenomenological Study

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**Abstract**— This phenomenological research study explored the experiences of educational administrators in the transition from their administrative responsibilities into retirement. The study was guided by a question addressed by three sub-questions. Data collected during the individual interviews with four (4) retired educational administrators provided the basic understanding of the issues and lived experiences as they transition into retirement from fulltime employment as educational administrators to retirees from the Laguna State Polytechnic University (LSPU) educational system. An analysis of interview data revealed four themes regarding the perceptions and lived experiences of recently retired educational administrators from the LSPU. These three major themes were (a) finances, (b) self-importance, and (c) health issues. The experiences of recently retired participants showed economic issues have a profound effect upon retirees, especially when they are unfavorable, and the absence of workplace activity may well lead to decreased self-worth and insecurity. Either or both, and in isolation or combination with other factors can impact their mental and physical health. The participants expressed a desire for all educational administrators to prepare earlier for retirement, attend retirement planning seminars and utilize family to successfully transition into retirement. The research study was not without limitations and further research on the topic was recommended.

**Keywords**— retirement transition, emerging issues, finances, self-importance, health, emergent themes.

## INTRODUCTION

The transitional process to retirement by today's educators and administrator is an issue of considerable importance for the persons undergoing that experience. Retirement is one of the most challenging transitions being experienced during individual's lifetime. Not only we are leaving a job that we have learned to do well, co-workers who had become friends, and structure expectations for our workday, we also may be losing the part of our self-esteem that comes from company recognition of a job well done. (Ashman 2017).

Most such persons will or already have made the transition from a life-long journey of guiding the learning experiences and opportunities for countless students and simultaneously providing leadership to numerous fellow educators. Such responsibilities tend to weigh heavily upon individuals and typically consume their professional work time, and quite possibly much of their personal time. Changing to a different life style, especially one that no longer carries a mantle of intense obligations and perceived respect can be welcomed and also be emotionally liberating. How to make such a transition in an emotionally satisfying manner tends to be a slippery topic, it has avoided clarification and usually is addressed in vague terms.

Retirement, according to the American Heritage Dictionary (2000), is the withdrawal from one's

occupation, business or office, and comes after having finished one's active working life. However, this term can have different meanings depending on a person and a context. Arizona (2001) said that the notion of retirement was perceived differently by the persons involved. For some it could be an event for a retirement party or a retirement gift. Others might consider it as a signal to begin an extended trip, while others could view the event as a time for receiving forms to be completed for pensions, extended health care benefits, etc. Not to be ignored is that retirement often puts a person into a new role, collecting money without having a requirement for performing acceptably in a workplace. Arizona's study found out that point was that each person tended to have a personal interpretation on the phenomenon of retirement.

The transitioning process of employment to non-employment, as with school administrator, military to civilian life, executive's retirement transition, and even professional women's transition into retirement (Goodman, 2002). But there is little definitive information available that addresses educational administrators approaching and/or entering the change of life stage termed retirement. Most available studies have sought to identify emotional and personality factors of retiring persons and their apparent preparedness for the career transition process. Those studies centered on themes including: (1) a participant's

image of successful retirement, (2) how participants prepared for and handled the transition into retirement, (3) how lost roles and activities were replaced, (4) what surprises and concerns were encountered, and (5) in retirement, what is the same as when a person worked and what was different.

Laguna and holding a greater number of employees, to date there are almost one hundred fifty permanent employees, and assumed to have fifth teen (15) retired employees for the past three (3) year according to the office of the human resources of the campus. In this study, five (5) retired employees of LSPU, who are the subject of the study. The purpose of the study is to describe the process and experience(s) of the educators and administrators during the transition from their teaching and administrative responsibilities into retirement. This research intends to: (1) Describe the preparation for retirement from the profession of education., (2) Describe the individual's transition from employment as an educators and administrator to that of a retired professional, (3) Describe the transition of "taking charge" (i.e., managing the transition) as they move from educators and administrator responsibilities to retirement.

### ***Socio-economic significant***

Individuals can view that retirement broadened social role, while others may consider retirement a resting stage and had no plans for new life projects. However, it may also, results to a dissatisfaction when facing retirement due to decreased in income, low self-esteem and the end of retirees' perceptions of themselves as useful. On the other hand, practice financial literacy skills may be an essential skill, especially in retirement, as seniors and their caregivers face the challenge of preparing a realistic budget based on fixed and often limited incomes, while reconciling many priority expenses. Another factor in the way retirement will be experienced is the existence of prior planning, because a retired person who has made plans is less exposed to frustrating conditions. It is important for planning to comprise a multidimensional vision, in which there is a balanced distribution of time between effectiveness, family life, leisure, socio-community participation and a reduced time working activity, paid or volunteer.

### **METHODOLOGY**

In this study the researcher employed phenomenological methodology, whose purpose is to describe particular phenomena, or the appearance of things, as lived experiences (Carpenter 1999:43). For a phenomenology study, the process of collecting information involves primarily in-depth interviews with the individuals. The

important points are to describe the meaning of a small number of individuals who have experienced the phenomenon (Creswell, 2007).

Phenomenology considers that the "true meaning of phenomena be explored through the experience of them as described by the individual". Phenomenology is an inductive, descriptive research method. The task is to investigate and describe all phenomena including human experiences in the way these appear. In the present study, the researcher used exploratory, descriptive and contextual design. The goal of phenomenological research is to describe experiences as they are lived; in other words, the "lived experiences". Phenomenological research further examines the particular experiences of unique individuals in a given situation thus exploring not what is (reality), but what it is perceived to be (Burns & Grove 1998:81).

Also, the researcher used Arizona (2001), procedural steps, that is: 1.) Explain a personal description of the phenomenon of interest, 2.) Bracket the researcher's presuppositions, 3.) Interview participants in unfamiliar settings, 4.) Carefully read the interview transcripts to obtain a general sense of the experience, 5.) Review the transcripts to uncover essences, 6.) Apprehend essential relationships, 7.) Develop formalize descriptions of the phenomenon, 8.) Review the relevant literature.

## **RESULTS AND DISCUSSION**

### ***Participants***

Research participants for this study consisted of two males and three females, with ages ranging from sixty to sixty-five at the time of investigation. Participants held a minimum of a master's degree and had been retired for five years or less. The participant experiences ranged from twenty-five years of educational experience to a maximum of thirty-five years. All participants worked and retired as educational administrators from Laguna State Polytechnic University, Sta Cruz Campus.

Participant 1 (P1) was a 64-year old married female educator/administrator of the university. She has thirty-three years of experience as an educator and administrator in LSPU. Her position held before retirement was the Director for Intellectual Technology and Support. P1 started her career in education as college teacher and moved her career being the administrator as Research and Development Chairperson and Director of Intellectual Technology and Support. She was employed in the university for thirty-five years. This is her fourth year as a retiree from the university.

Participant 2 (P2) was a 65-year old married male educator/administrator of the university. He has thirty-five years of experience as an educator and administrator in LSPU. The position held for before retirement was campus director of the university. His educational career has progressed from vocational teacher to educational administrator within the same system. His educational journey within that system has allowed him to experience numerous roles as an administrator, learning as program coordinator, along as the dean of one of the departments of the university, and finally serving the majority of his career as the alter ego the university president. This is his second year as a retiree from the LSPU.

Participants 3 (P3) was a 65-year old widowed female educator. She has thirty-five years of experience as an educator and administrator in the tertiary school setting. Before retirement, she served as a college dean. P3's educational career is very diverse due to her vast experience within school system. P3 served her career in the same system serving as high school teacher to college professor, program coordinator, and chairperson. This is her second year as a retiree from the university.

Participant 4 (P4) was a 60-year old married male. He has twenty-eight of experience as an educator in university. Before retirement, he served as Associate Professor IV in the school system. P4's educational career has progressed from vocational teacher while teaching Mathematics as well.

P4's experience in teaching has primarily focused at serving as curriculum and research coordinator for the college education and finally completing his career faculty of the graduate study of the institution. This is his first year as a retiree from LSPU.

### **Individual Interview Findings**

All participants in this study were relaxed and at ease with the researcher. The participants provided information willingly and were not reluctant about giving candid answers to the questions. If further information was needed after the initial interview, communication was achieved through telephone communication, email or face-to-face conversations.

The same questions were asked of each participant. This provided some consistency and common starting points across all interviews. These educational administrators from LSPU reported their own lived experiences during the preparation and transition into retirement. In-depth, face-to-face interviews were used to collect detailed data from the experiences of recently retired educational

administrators to address the research question of this study.

### **Question 1. How do you describe your preparation for retirement from the profession of education?**

#### **- Participant 1**

"I was so excited for my retirement thinking that no more struggling of hours in coming to school before the time, not letting my students comes before me. No more burden to myself on what to prepare on my classes, asking do they learned something from me, what are they doing if I was out of the school to attend seminars and trainings, have I impart to them my learnings and teach them many things for their improvement? Actually, I do not know what to prepare? Do I need to say something to my co-workers, to my students? I am at a loss of what to do. I have prepared myself that this time I'll be concentrating on the quality of time to my sons and daughter. I will be having time for the house hold chores, checking the status of our house and other matters"

#### **- Participant 2**

"Well, if you do not have then money to pay the bills, then you must keep working. No question about that. I have a beautiful wife and two kids. If I can't provide for them then retirement was not an option. However, I have additional opportunities that will supplement our income. Then I am going to truly retire"

"I enjoyed my job; however, my wife (an educator) and I realized that we would be losing money in the long run. So, we decided to retire, cut back a little and spend more time with our children and possible grandchildren. We would be foolish to keep working even one more year with the way the state has raised our insurance."

#### **- Participant 3**

"I could have retired earlier from my job but knowing that waiting until I was the age to draw my Social Security would be best for my family and our income. Also, my wife reached the age to draw Social Security the same year that I did, so decision to retire became easier because we had enough income to live as we were accustomed."

#### **- Participant 4**

"I felt as if I was drowning in the paperwork. I had to deal with the increased standards and requirements that were placed on us by the university. This caused me to examine my life and if I wanted to stay in education."

“Over the years these demands have caused a lot of great teachers and administrators to leave our profession. We cannot keep putting more and more on educators with less and less. Eventually, people will grow tired and frustrated.”

**Question 2. How do you describe the transition from employment as an educators and administrator to that of a retired professional?**

- **Participant 1**

“The transition from employment as an educator and administrator is very hard on my part, but modesty aside I would, like to thank everybody (students, personnel, faculty and administrations) for being cooperative and supportive they are my wings and backbone without them all of my activities will not be successful. “

- **Participants 2**

“I have a sense of loss not seeing the smiling faces of my students. I took for granted the day- to- day things that made my job great. It was all about the kids. They kept me young. It took time to adjust into retirement because I felt unknown after I left my position.”

- **Participants 3**

“I felt that I was no longer as effective as I was at one time. As I moved into retirement, the things I sometimes hated, were some of the things I missed the most. I miss resolving issues for people, daily communication with educators and students.”

- **Participants 4**

“No more preparing things in teaching my students, free from stress coming from different projects, paper works, and relationship (pakikisama) with my friends, co-workers and my superiors. But later, I realized that I need to prepare for the things that I will leave to my co-workers, or to the one who will take place of my position. Like my personal things, and the things that I have done for the campus, thinking that I really spent a lot of effort before it has been materialized and hoping that this will not be wasted. “

**Question 3. How do you describe the transition of “taking charge” (i.e., managing the transition) as they move from educators and administrator responsibilities to retirement?**

- **Participant 1**

“There are times that I wake early. Since I was used to it. This time I wake up on my own desire, not like when I am working, even I like to sleep more, I was forced to wake up early for cooking, fixing things needed by my

kids, leaving all the things accomplished. Since I stay at the campus whole day.

“I missed my teachings to my students, that is why I volunteer myself teaching Research at MRC, Calauan, Laguna without any compensation just a mere thanks you. I accepted it, the fact that my brain will not be stagnant and in order to avoid what is known as Alzheimer, and to make myself busy”.

- **Participants 2**

“I have a sense of loss not seeing the smiling faces of my students. I took for granted the day- to- day things that made my job great. It was all about the kids. They kept me young. It took time to adjust into retirement because I felt unknown after I left my position.”

- **Participants 3**

“With the rising test score requirements and the cut of personnel from the school, the pressure became overwhelming. I began to become depressed, taking out my frustration and moods on the staff and most of all my spouse. That is when I felt it was time”

“Health factors played the significant role in many choosing to transition into retirement. My health started to deteriorate and I wanted to leave while my health would allow me to do other things.”

- **Participants 4**

“The stress level became overwhelming and my health suffered...but after retirement saw improvement in my physical and mental health.”

**Emergent Themes**

The purpose of the current qualitative phenomenological study was to explore the perceptions and lived experiences of recently retired educational administrators from LSPU. From the interview questions, four major themes were (a) finances, (b) self-importance and (c) health.

These four concepts were identified as emerging themes because they were consistently and continually discussed by the participants of the study. At some point during their interview, each participant referenced the idea financial security, need of belonging, and health concerns.

The participants were able to express their thoughts, beliefs, attitudes, and perceptions on the lived experiences of educational administrators in the transition from their administrative responsibilities into retirement.

### 1. Finances

Finances are a key theme for this research. Ashman (2017) states financial planning is considered the most important item to be discussed because, without adequate counseling, resources will be inadequate and unavailable at a most significant period of their lives. This was shown when all five participants for this study discussed how finances played a key role in their decision to transition into retirement. P2 stated “financial issues play the main part in the decision to retire”, because one “must be financial secured” to truly retire and not just switch jobs. P3 spent a significant amount of time with her husband examining their finances. “I looked at all aspects with my husband, all the forms and financial figures and chose to retire because of our stability.” Her husband, whom is a financial advisor, explained “we were financially set”, which made her decision final and lifted any doubt of her families need for her current salary. “Financial security plays a huge factor in the decision”, which P4 stated sums up how every participant in this study felt in regards to their decision to transition into retirement.

### 2. Self-Importance

Retirement involves role change, and the transition may be viewed as more or less difficult, depending on role gains and losses (Bridges, 1991). In this regard, a common theme that she heard as she listened to stories of quite diverse individuals was the need to matter, to feel important, appreciated, and depended on by others (Creswell, 2005). Five participants in this research discussed how retirement from their educational administrative positions had some impact upon their self-importance. After leaving their positions the retired professional felt that their identity had been stripped away. Retirement is one of life's milestones. However, many people view retirement as a loss of roles, income, and socially recognized productivity. Retirement itself has no predictable negative effect on physical health, self-esteem, or life satisfaction. It took a significant amount of time to adjust into retirement and as P4 stated that he “felt unknown” after leaving the position that had given him his identity for so many years. P2 spoke about how he “did not prepare for the phone to quit ringing”. The very thing that he grew so tired of during his tenure as an educational administrator was the very thing that he missed the most. He stated that he “missed the interaction with people and them relying on me”, which gave him a sense of purpose and he began to feel he was “no longer as effective as I was at one time”. This seems to be the viewpoint of many retired administrators as they journey into retired life.

### 3. Health

The final theme that five participants discussed focused on health issues that arose from their educational administrative positions. The stresses that were related to their jobs weighed heavily on the human body. Many of the administrators were not truly prepared for everything that they would face during their careers. As these obstacles arose many participants started to struggle with fatigue, memory loss and even more severe medical conditions, such as heart problems and diabetes. P3 stated “my health started to deteriorate and I wanted to leave while my health would allow me to do other things.” In many cases, administrators do not realize that it is the job stresses that play a part in their deteriorating health condition. P4 explained that “my stamina faded and I was extremely tired” but it was approximately two years before she truly saw it was the stresses of the position that assisted in her condition. She realized that “health issues became overwhelming and I needed a break.” After retirement she “saw improvement in my physical and mental health.” Even though many cases are not the same in regards to the physical outcome, health related issues play a huge role and impact upon how and why many educational administrators transition into retirement.

### CONCLUSION

This phenomenological, qualitative study examined the experiences of recently retired educational administrators as they transitioned into retirement. Five participants who had between 25 to 35 years of experience and had retired within the past five years were interviewed. This study provided new insight into the retirement transition of educational administrators within the Laguna State Polytechnic University-Sta Cruz Campus. The three themes that emerged (finances, self-importance, and health) allowed the researcher to gain a better understanding of the experience of transitioning into retirement. In conclusion, based on the findings of the present study, the experiences of recently retired participants showed economic issues have a profound effect upon retirees, especially when they are unfavorable, and the absence of workplace activity may well lead to decreased self-worth and insecurity. Either or both, and in isolation or combination with other factors can impact their mental and physical health. However, gaining a better understanding of the transition process into retirement through the Retirement Systems of LSPU counseling service, staying active in the community and with family helped recently retired educational administrators be more open to lifestyle changes and maintain a better quality of life.

### RECOMMENDATIONS

The target audiences identified at the beginning of this study were educational administrators from LSPU and their transitional issues experienced into retirement. This study highlights some of the transitional issues that these administrators faced into retirement. In order to more successfully transition into retirement, these issues need to be addressed. The findings spotlight the reality of educational administrator's experience while transitioning into retirement. This is definitely important information that educational administrators need to be aware of before deciding to make the transition into retirement. This study pinpointed several retirement transitional issues such as the knowledge gained through preparation courses by state retirement agencies and the impact that these administrative positions put on the human body. All educational administrators approaching retirement or not may find the significance of this knowledge invaluable to their one-day successful transition into retirement.

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