

CHAPTER 1

INTRODUCTION

Context of the problem.

School principals participate actively in the management and leadership of schools. Their role as school leaders involves them in a multitude of activities, including, interactive communication, public relations, personnel management and development, financial and budgetary control, shared and authoritative decision making, marketing, resource management and program development and implementation.

But principals, like all in the workplace, must ultimately retire from their occupation. Such are the subjects of this study. The purpose of this research is to investigate if these former school principals, who have now finished their working lives and have entered retirement, play an active and influential role in their community, and why they choose to pursue this particular role. In order to explore the many aspects of this research inquiry, a major research question has been developed enabling the issues arising from this investigation to be thoroughly examined, data collected and analysed and conclusions drawn. The major research question for this study asks - *What is the role played in the community by retired school principals?* To further expand and understand the problem two subsidiary questions have been formulated to assist with the inquiry. These are - *What retained leadership skills do retired school principals use in the community?* and *How does the community benefit from retired school principals' active participation and involvement in community activities?*

Statement of the Problem

Specifically, this study intends to investigate:

- * The type and range of activities in which retired principals participate.
- * The reasons why retired school principals are involved in voluntary and/or unpaid work.
- * The roles taken by retired school principals in their community.
- * The education [formal and informal] undertaken by retired school principals to meet their current needs.
- * The various organisations in which retired principals participate and which they support, and what influence these organisations exert on the community.
- * The community's attitude towards retired principals' participation in community activities.

Significance of the Study.

Quality of life after retirement is a pressing social issue. Time is now available to spend on issues that are important to the changed lifestyles of retirees. Retained skills, networks and drive need redirection in retirement. Issues such as financial dependence on the pension, superannuation funding or independent funding have led to increased political interest, and the creation of a real pressure or lobby group that demands equity within society.

A review of relevant literature indicates that there has been little if any research on the role of the retired school principal in the community after his/her retirement. Thus, the significance of the current research lies in its focus on the active and important roles being played by retired school principals in today's community life.

The "older" or "senior" community within our society has created health and welfare needs and issues not previously envisaged. It is heralding a new, vocal and powerful action group within our society.

Outline of the Chapters of the Thesis.

This thesis entitled, *The Role played in the Community by Retired School Principals*, is divided into six chapters. The following is a brief description of the content of each chapter.

Chapter 1 Introduction.

The *Context of the problem* provides a brief introduction to the research study, creates the setting and explains the reason for the study.

The *Statement of the problem* explains explicitly what research is to be addressed.

The *Significance of the study* indicates that there is practically no directly relevant literature in this research field. Consequently, the importance of the current research lies in its focus on the interesting and unique roles that retired school principals have in present community life.

The *Outline of the chapters of the thesis* briefly describes the content of each chapter in the thesis.

Chapter 2 Review of Related Literature.

The *Introduction* indicates that little or no research has been conducted on the topic of this thesis, and states that the readings noted are wider in application and focus than would be expected. It notes that the Review of Literature intends to categorise its readings into three parts, on retirement, on the community, and on the aged.

The sub-sections, *on retirement*, *on community* and *on ageing* reveal the

themes that emerge from the literature base.

The *Conclusion* states that the literature cited in the review provides a direction for the research to follow. Universal issues are highlighted and key issues identified.

Chapter 3 Methodology .

The *Introduction* states that the purpose is to examine the problem set for the research, and describes the methods to be used to complete the task.

It restates that retired school principals are the subjects of the study.

The *location and availability of data* has two sources. One source is the literature review. The other source is the data gathered during face-to-face interviews with individual retired school principals, who have lived or worked in the Metropolitan East Educational Region of N.S.W.

Data collection is to be by a combination of methodologies, with the emphasis on qualitative and survey research. Naturalistic research methods have been extensively followed.

A *Description and Outline of the Conceptual or Theoretical Framework* is given and its importance to the study revealed.

The *Case Study approach* and interview system is explained. *Questionnaire* design is planned to provide an accurate view of the respondents' lifestyle and community participation. The use of the TAP paradigm is explained.

Assumptions and limitations are stressed in relation to the research.

Finally, the *conclusion* states that a research framework to gain accurate data has been established, so that the set problem may be addressed with major findings highlighted.

Chapter 4 Analysis of the Case Studies

The *Introduction and overview of the Case Studies* gives details about the

fifteen case studies completed, the characteristics of the subjects and the necessary criteria to be a case study subject. It states that retired principals were personally interviewed and outlines the purpose of the prepared questionnaire.

Relationship between the Literature Based Review and the Case Studies The literature based review provides a background for the study. It suggests that the direction of the inquiry is based on literature regarding retirement, community and ageing. It provides a base for the formulation of the questionnaire and enhances the analysis and the interpretation of the collected data from the case studies.

In *Conclusion*, the purpose of the questionnaire and the following interviews was to inquire into the lifestyle of retired school principals, their function and relationship in the community and the need in for the community to use their expertise and skills.

Chapter 5 *An Overview and Analysis of the Case Studies*

This chapter provides a brief overview of each case study, followed by an analysis that is pertinent to the aspects raised by the research question.

Chapter 6 *Summary and Conclusion.*

It is here that the problem set for the research is restated and the research question is considered. The aims of the study are revisited. The reasons for embarking on this study are clearly defined, and the contention made that there are numbers of experienced and committed retired principals participating in local community life.

In *Summary Description of Procedures* the criteria necessary to become a case study subject are described.

A brief review of the *Methodology used in Data Collection* and the question

design is detailed. The need to find a new direction for retired principals' drive and enthusiasm is discussed in relation to personal satisfaction and fulfilment.

The *Concept of the study* describes how retired principals accept responsibility for creating opportunities to develop new roles for themselves in post-retirement life.

The *Effect of Retirement on the subjects* highlights the need they had to find a different direction for their lives. The way the subjects choose this undertaking provides the answers to the posed questions.

An *Analysis of Findings* for the research question and the two subsidiary Questions is listed.

Major findings of the study describe the general characteristics of the studies, the difficulties they experienced initially on retirement and the way they used their strengths and expertise in the community in an effort to build a personally satisfying retirement lifestyle.

Suggestions for further research involve leadership studies and retirement. Several suggestions are made.

A *concluding statement* claims that retired principals play an important and influential role in the community. Reasons for this statement are listed and expanded.

CHAPTER 2

REVIEW OF THE RELATED LITERATURE

INTRODUCTION

Following the author's completion of an extensive literature search, it is her belief that little research has been conducted on the role played in the community specifically by retired school principals. Thus issues of leadership, interests and activities, work, leisure, self education, organisation membership and community involvement, as well as the continuing or changed role from pre-retirement to post-retirement of retired school principals appear to have been neglected.

As a consequence of the scarcity of actual 'on-topic' material, this literature review embraces the search for selected readings with a wider scope and depth than the topic would seem to require. Nevertheless, it has been possible to gather a variety of readings and although few are directly relevant to the specific topic and questions posed, a general impression of the transition from work to retirement and the need for retirement satisfaction is strongly expressed. Selected readings have been chosen in terms of the following: *1] on retirement; 2] on community and 3] on the aged*. On this basis the literature review has been developed.

ON RETIREMENT

Several themes emerge from the readings on retirement. These are: retirement is inevitable: there is a transition period prior to and at the commencement of retirement; active planning for retirement leads to retirement satisfaction and retirement brings new options and challenges.

Some readings which explore these emerging themes and issues and establish a basis for this study on the role played in the community by retired school principals, are the Department of Primary Industry's [1981] "Retirement, the ultimate goal", which regards retirement as an activity that all people strive to reach. This publication reviews possible options that are available to retirees and include leisure, voluntary work and travel. Awareness of health issues is raised. Jones [1988] reviews the options available to people after work and Belles [1978] looks at planning for a healthy and fulfilling retirement. Belles includes sections on vocational guidance, education and retirement.

The transition period from work to retirement is a significant period in determining the direction taken and subsequent life satisfaction in post-retirement. Clarke [1995] studied the phenomena of retirement in the '90s. He identified and described the transition process of a group of male retirees, detailing the processes of learning and adjustment and their influence on life satisfaction, simultaneously revealing some learning processes significant and relevant to pre and post retirement. Kilty and Behling [1983] state that, although the professional worker of today is likely to be the prototype for the retiree of the future, professionals are the neglected groups in the retirement literature. Kilty and Behling examine the attitude towards retirement of four types of professionals; attorneys, high school teachers, social workers and college professors. Intentions were defined in terms of retirement projections, considerations for early retirement, and thoughts about life after retirement. Six relevant factors were identified, 1] social and cultural forces [age, gender and profession], 2] alienation from work and everyday life, 3] work history, 4] lifelong habits of using time constructively, 5]

extensiveness of financial preparation and 6] choice of retirement lifestyle. Results indicated that professional alienation, financial preparation and choice of retirement lifestyle were common goals strived for by all subjects.

Some of the readings that relate directly to principals and teachers are negative about their approach to retirement. In an article by Feteridge [1990] it is stated that principals have few outside interests, fail to plan for extended leisure time and are at a loss at retirement time. Feteridge makes the point that an effective retirement plan is needed to identify ways to replace goals met by work. This idea is reinforced by Patrickson [1994] who reports on the attitude of a small sample of women in education. When offered the option of early retirement or remaining in their profession, they opted to remain in the job as they were totally committed to their work role. By way of contrast, Manke [1995] records the reflections of three retired teachers on their teaching careers, as they discuss their reactions to change in education. Their expressed attitudes challenge the previous writer's belief that all teachers are resistant to change.

The transition period from work to retirement is the focus of numerous writings. Most seem to stress the need for planning and preparation prior to retirement if retirement satisfaction is to be attained. "Expectations of Life. Increasing the Options for the 21st Century", by the House of Representatives Standing Committee for Long Term Strategies [1992], provides a detailed report on work and leisure activities, and expresses the view that it is necessary to have alternatives to full-time employment in the future. Coleman [1983] inquires into the preparation made by people

contemplating retirement and outlines various life skill options and many facilities and organisations available to assist with pre-retirement planning. Dorfman [1992] provides descriptive information on the transition of academics to retirement and notes the relationship of health, the importance of teaching, research and consultation both before and after retirement. Dorfman also notes the relationship between retirement satisfaction, and shows the retirees' perceptions of financial adequacy, participation in paid and unpaid work and voluntary activities, and also that creative work was the most consistent predictor of satisfaction. Munnich [1990] explores the potential contribution of senior scholars in society and the personal consequences of remaining active and productive in retirement. Three attributes are described: expertise, decoding one's past, and wisdom. Markham [1993] pursues the meaning of the impact of retirement and notes that the important ingredients of a successful retirement are good health, adequate finances, keeping mentally occupied and maintaining good marital relationships. He concluded that each retiree's transition/adjustment was unique, involving the interaction of numerous factors. Kompf [1991] examines the experiences encountered by the retirement of teachers. The dynamics of retirement and the predisposition towards retirement are considered as influences in professional withdrawal.

Options for continuing educational roles for retired teachers are addressed. Anderson [1983] divides his work into two discreet parts. The first is concerned with the theoretical aspects of ageing and the relationships this life process has with retirement. Second is an exploratory study of some members of the Retired Teachers Association of New South Wales, which examines their participation in education since

retiring. Anderson uncovers evidence that several social factors work to undermine the self image of the older individual's role in education. He pursues the concept that retirement and leisure act either to facilitate or to impede the entry into education by older adults. Anderson seeks to identify some of the factors that aid policy development towards the implementation of the concept of life-long learning. He provides a descriptive profile of a retired group of men and women participating in educational courses since retiring and their perceived role as learners.

Throughout the literature, the difficulties of adjustment from work to retirement have been stressed. Whitfield [1992] shows through his research that pre-retirement work had been all consuming. Retirement had been a radical change and adjustment to retirement difficult. He concludes that if higher emphasis had been placed on pre-retirement leisure and planning the transition would have been less traumatic.

It was heartening to find a positive unpublished paper by Travers [1995] that investigates the aspirations and activities of educated women aged 60-90 years. These women, decades after retirement, have found through participation in community writing groups and resultant publication of their writings, not only intellectual stimulation, but an active voice within the community. Leadership roles, active participation and organisation structures were examined in association with this study.

Life satisfaction of retirees is a major issue in retirement-focused literature. Cooper [1991] looks at the life satisfaction of early retiree teachers. The focus is on health, financial income, leisure/recreation and relationships with relatives and friends. The findings shows attitudes

towards relationships, leisure/recreation and finances most significant predictors of life satisfaction, with the "importance of their relationships" being the most positive. In a study by Morud [1990], preceptors about retirement are identified and suggestions regarding retirement planning for retired school educators are made. A survey sought information about retirement lifestyle, preparation for retirement, employers' responsibilities, commencement time for program components, retirement activities and volunteering, reasons for retirement satisfaction, residence and relocation and general advice. Results suggest that successful retirement lifestyle is a reflection of attitudes and expectations and that these can be influenced by pre-retirement planning. Pre-retirement planning is desired and desirable on both financial and non-financial grounds and should commence at age 45. It was found that financial preparedness provides the retiree with the ability to retire and preparedness in non-financial issues provides a higher quality of life in retirement.

Dutcher [1989] examines the relationship between satisfaction in retirement and a variety of social, work-related and demographic variables in an attempt to find if personality, particularly introversion or extroversion, affects the number of activities a person engages in during retirement. Data was gathered from teachers and principals and reviewed for life satisfaction in the areas of pre-retirement planning, activities, health, income, marital status and whether retirement was voluntary or forced due to age or disability. Dutcher indicates that activities and health are important for satisfaction in retirement. Extroverts have a higher rating on activities but not significantly so. Satisfaction in retirement is important. Negative influences expressed by retirees are

worries about depletion of income due to rising inflation and medical costs. Voluntary retirees express higher satisfaction levels and married and single retirees express higher life satisfaction than widows and widowers.

The NSW Department of Technical and Further Education [TAFE] in a report written by Latona [1988] examines the educational provisions for older adults. The areas investigated were older worker training and retraining, leisure learning, pre-retirement education, frail elderly educational programs, access strategies by institutions to encourage older people to learn, changes in educational institutions as they cater for older learners, volunteer older workers in educational areas and national and international projects and programs which affect the education of older learners.

ON COMMUNITY

The aim of this section of the literature review is to relate community leadership with retired school principals. Again it has been a difficult task. Nevertheless, some pertinent readings about community leadership by retired people have been identified. Although providing a wider focus than hoped, these do provide some understandings that can be applied to the topic being covered by this research project.

A somewhat dated, but nevertheless challenging look at the relationship between work and leisure in the community is given by Salaman [1974]. Through his analysis of interview data, he reveals that retirees find difficulty in distinguishing between leisure and voluntary work, as one becomes interchangeable with the other. Schultz [1991] reports on leadership enhancement programs for the active retired through which

retirees were trained for leadership roles within the community. Trainees were assisted to gain motivation, confidence and awareness of community needs. During the course, active retirees learned to focus their energy, time, skills and interests on community leadership. A follow-up article by Schultz and Galbraith [1993] reports on interviews with older adults participating in a community based program for retirees entitled "Leadership Enhancement for Active Retired". The authors present some pertinent findings gathered from these interviews. These are; 1] a greater number of women are engaged in community leadership; 2] pre-retirement leadership roles do not predict post-retirement leadership; and 3] leadership training must be relevant, experiential and practical.

In a major inquiry conducted by the Australian Parliament House-of-Representatives-Standing-Committee-on-Community-Affairs [1990], submissions from organisations, government departments, academics and interested individuals were sought in response to the inquiry into the community involvement of retired persons. Under the title, "Is Retirement Working?", terms of reference were to examine the effectiveness of current arrangements to assist retired persons and those planning retirement to: 1] maintain an active role in the community; 2] have access to advice and options which maintain an active and positive use of leisure time; and 3] provide maximum opportunity to participate in voluntary and/or paid work.

Numerous workshops were held and many informative papers were produced. Some of those more pertinent to this study are described [see Bibliography]. For example, Kendig examined some of the social perceptions and facts that have given rise to concern for social involvement of older people. "New" assumptions about older people and the "problems" and

potential are considered. The role of older people of today and tomorrow is examined. In a workshop paper, McCullum examines the persistent barriers to community involvement by the elderly. Two questions are pursued: 1] what social changes have occurred which shift the late life balance between work and leisure; and 2] is there an identifiable pattern of community involvement in old age and are there barriers to health promotion and the promotion of an active society?

Elsworth reports on observations of older participants at the Hawthorn Education Centre. He argues that there is a growing awareness amongst older people of the positive aspects of older life. There is a rejection of stereotyping that undervalues and degrades them. The media must accept the role and the responsibility to portray an accurate and balanced view of all groups in society. Similarly, Mendelsohn argues that the whole idea of retirement is too structured. Another model should be evolving. Work and lifestyle changes should be progressive as people near retirement age, so that it is a natural and gradual departure from the workforce. Daley, provides a perspective of the union movement on issues relating to retirement age, and on the need for strategies for pre-retirement, such as financial and lifestyle planning.

Summer discusses why older people engage in voluntary work, the factors to be considered when choosing volunteer work, barriers to increased and fulfilling volunteer involvement and future requirements for older people in the volunteer sector. Gilding questions whether we have an adequate philosophy of leisure to handle the increased numbers of "young old" in our society. It is only by understanding leisure that we are likely to get our policies and programs right in relation to community involvement of retired persons.

A report by Schuller [1992] examines key issues in education, training and access to information among adults aged 50 and over in the United Kingdom. It concludes that older adult access to education has increased during the past decade, but remains fragmented and is strongly affected by social class and educational background. The report states that attitude, finance, transport and time constraints remain barriers to older adults' participation in the program. Several policy options are identified that enable older adults to consider and take advantage of their educational entitlement.

ON AGEING

This entire study is based on the concept of an ageing population and the role that a specific section of that ageing population [retired school principals] plays within the community. There is a wide spectrum of concerns and issues arising from an aged society, and these are the concerns and issues that must be met and dealt with by retired school principals as well as by all members of the ageing society.

A valuable view of the needs of an ageing population is given by Carver and Liddiard [1978]. Although somewhat dated their work is a valuable source book, with papers contributed by numerous authors. These provide a comprehensive coverage of the wide spectrum of concerns and issues arising from an ageing society. They include papers on ageing populations in our society and social and environmental concerns; myths and experience on growing old; living in the community; needs and problems rising amongst the aged; disabilities and sickness in later life; the professional carer or worker and the contributions made by the professional social services/caring/health/ services in the community.

Young [1991] builds a scenario that society must acknowledge. That is, we are living in an ageing society where the "aged" are active and concerned people. Young examines the involvement and the effect the "aged" have on the everyday living of all. It is an understanding that the whole of our society must acknowledge and accept. Hirsch [1978] discusses "Age-ism" as a term to describe the bigotry and prejudice against older people in U.S. society. Negative attitudes towards the elderly and the stereotype of older people depicted in the media are recognised. In a Harris survey conducted in 1976, 60 percent [over 65 years old] of those interviewed regarded life after 65 as lived by unalert, physically inert, narrow-minded, ineffective and sexually finished old people rotting away in poor health. He states that, unless positive steps are taken to improve their image, age bias is bound to increase as the proportion of older people increase. Hirsch suggests that the older people themselves must accomplish the projection of their image as a group of people with usable talents, skills and life experiences that are valuable to themselves and to the community. Since 1962, the Institute for Retired Professionals has offered the opportunity to retirees to be part of a peer learning-teaching community. The Institute provides cultural and creative outlets through participation in art classes, chamber music, choral work and travel. Social activities in each learning group and democratic involvement in decision making is a vital aspect of the program. It was noted that educated retirees are a minority in the program but, nevertheless, a growing sector of the retired population. Hirsch states that educated retirees are beginning to recognise that the incentive and responsibility for creating a new role and opportunities will have to come from the old themselves.

A challenging aspect of older adults' interest range and participation in

activities is revealed by Allen [1991] who reports on a senior citizen agency in New York State that explored the program development needs of older women. A random survey asked about the interest and participation levels in programs addressing health, financial affairs, legal affairs, culture/family traditions. Respondents were divided into age groups. Women aged 85+ had no desire to become active participants in any program. Women aged 75-84 were conservative spenders, would pay only for programs of top quality, and preferred to leave the program with something tangible. This age group preferred expert speakers on "instrumental" topics such as finance and health, and to socialise while learning through self-directed courses. Women aged 65-74 were too active and too busy to participate in program development in a leadership role but would attend such programs. Women aged 55-64 were already involved in many programs, were interested in information on care giving and expected to continue to be active participants in society. They were able to pay small fees for programs. The conclusion from this study was that organisations developing programs for the elderly should be careful not to group them into one category of those over age 55, but do a periodic needs assessments that would serve this varied clientele.

When considering retirees, literature concerning the general characteristics of older people must be taken into account. Foos [1996] reports after studying two groups, one over age 60, one aged 17-39, that both groups believed that many items are better remembered by older adults. Nevertheless, the findings show that the older group reported some memory loss, and both groups agree that some memory tasks are more difficult and take longer for the older adults. The older subjects used more external memory aids.

Beatty [1996] addresses issues of ageing, expectations for aged persons and the means to respond in practical and educational ways to the changing needs of the older adult. Another publication by Beatty and Wolf [1996] further explores the issues of ageing, expectations for aged persons and the means to respond in practical and educationally sound ways to the changing needs of older adults. The study looks at the role of older adults in the world of today and tomorrow, the challenges that ageing presents to the practitioner and examines processes for practical engagement and connection with the ageing people in society.

A paper presented by Clavner and Clavner [1992] discusses the educational potential of senior citizens. The focus is specifically directed at whether senior citizens would benefit from a higher level of involvement and integration in tertiary education. The investigation reviews demographic data, the cognitive functioning of older adults and the shortcomings of curricula designed exclusively for seniors. The survey of students 60+ showed that most had taken courses previously, the majority were enrolled in arts or science, most perceived learning to be an end in itself, respondents were completing all course work and respondents reported that they had not experienced age discrimination from either the faculty or students. Clennell [1990], when surveying older students [60+] from four European countries, found that most were studying the humanities, were studying to keep the mind active, to develop an interest and to achieve personal development and satisfaction. Older students appeared to be highly motivated, well organised, hard-working, and capable of adapting to course demands. Future policies for education were identified; a new profile of ageing, active participation, access to adult education for older students, teaching and learning methods,

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intergenerational issues, and changing concepts of retirement. Continuing with this theme, Glass [1989] refutes the stereotypical view that intellectual abilities decline in old age, and states that researchers have discovered that most older adults are active, intellectual and involved.

CONCLUSION

In searching for a literature base that best responds to the research question - *What role do retired school principals have in the community* - little material that is wholly pertinent has been found. There appears to be a void in information covering this area of research. However, the literature cited in this review indicates that further investigations may reveal the findings that are being sought. Accordingly, the general mode for this research will be through investigative case studies of a sample of retired school principals.

From this literature, universal key issues, even if generally based, are highlighted. These relate to retirement, the transition from pre to post retirement and the roles taken by retirees. The challenge to develop these issues will be the basis, framework and context of a viable, relevant and worthwhile research study.

Emerging from these key issues documented in the literature is an awareness that we are living in an "ageing" society, where the "aged" are active and concerned people. The realisation that retirement is an activity that all people strive to achieve is an important aspect that must be understood. The literature stresses that retirement is a change process. The transition from work to retirement requires preparation and

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planning. Retirees need to understand and value the importance of leisure and work for the "aged". They require the attitude and the ability to adapt to the change in their lifestyle. Emerging from the literature are findings indicating that not "all old" are the same. Different age groups have different expectations, needs and drives. This fact has to be taken into account when considering the community participation and leadership.

The literature shows that there are leadership opportunities available for active retirees in the community, but there are also barriers to community involvement for the "aged". Some readings express a concern about the myths and misconceptions of ageing portrayed by the media .There is an overall feeling emerging from the literature that it is the responsibility of older adults to show their accomplishments, talents, skills and life expectancy. They are the ones who must project a better image ; an image of being active and concerned people.

Thus the literature shows that retirement brings new options and challenges. If this assumption is accepted as the basis for the research study, then the starting point has been identified, a plan can be formulated and the investigation carried through to a conclusion that satisfactorily provides a solution to the research question.

CHAPTER 3

METHODOLOGY

Introduction.

The purpose of this chapter is to examine the problem set for research - and reflected in the title of this thesis - *what is the role played in the community by retired school principals*, and to describe the methods used to address this question. In order to respond fully to this question, an inquiry process must be established whereby data is gathered, analysis made and outcomes or findings declared.

The subjects, retired school principals, provide the foundation for numerous case studies. These cases form the framework of the research and are the main source of the data collection process prior to analysis, interpretation and the drawing of conclusions.

This chapter addresses: the location and availability of data; the collection source and the strategies used in its collection; the construction of questions and the design of the questionnaire; methods of data collection and analysis; an outline of the conceptual framework used in the research study and the case study approach.

Location and availability of data.

Data has been collected from several sources; the literature based review, people within relevant organisations, newspaper articles and by interview of retired school principals who live or have worked within the boundaries of the Metropolitan East Education Region in New South Wales.

The Metropolitan East Education Region is an administration region of the New South Wales Department of School Education. It extends across metropolitan Sydney from the harbour foreshores at Circular Quay to Waterfall to the south. It has one of the largest school population [numbers of students and schools, both primary and secondary] in Australia. It has a greater school population than the South Australia Department of Education.

The main source of information for this research project is provided by retired school principals who are the subjects of fifteen case studies. Some of these respondents are known personally to the author, but the majority have been introduced by others. All are active, concerned people, and previous members of either the Metropolitan East Primary or Metropolitan East Secondary Principals' Councils. The length of their retirement from schools ranges from five to fifteen years. They form only a small group of a much larger group of retired principals who are in good health and are active within their community. It must be acknowledged by the author, that there is the possibility of a "self-selection" bias, and hence the omission of "non-active" retired principals. Nevertheless, at the time of selection of subjects, the extensive network of former principals available to the author was not able to locate any known retired principals who were not involved in some way with community activities.

Collection of data.

A combination of methodologies has been used in data collection, with emphasis being placed on the qualitative domain. Leedy [1993:141] outlines six features of qualitative research.

1. Qualitative studies tend to be field focused.
2. Qualitative research considers the self as an instrument of data.

collection and of interpretation of data.

3. Qualitative analysis is interpretive by nature;

a] researchers try to interpret or make meaning of what they have been given an account of; and

b] researchers try to see things as those being observed see them.

4. Qualitative studies use expressive language and voice in the text.

5. Qualitative studies pay attention to particulars.

6. Qualitative research becomes believable or validated because of its coherence, insight and instrumental utility.

Collection Source.

The collection source has followed naturalistic research methods.

Collection of data has not been completed in isolation. Although treated separately in the reporting of the findings, analysis and interpretation have not been relegated to a period following the data collection, but conducted concurrently with the collection process. This approach to data collection with interrelated analysis has highlighted the need for new questions, provided issues to focus upon and strengthened the formulation of tentative conclusions.

The need for authenticity has always been addressed during the data collection and analysis stage. There is an on-going need to be aware of:

1. Distortions arising from researcher bias [conscious or unconscious]

2. The degree to which the field worker's perceptions and interpretations are influenced by personal relations formed with people on site.

3. The researcher's influence on a setting - the impact of the researcher's focus on the particular issue, presence on site, questions, responses during conversations, verbal and non-verbal reactions to events and so on.

4. Unconscious or deliberate distortion by respondents - people telling the researcher what they think the researcher should or wants to hear; misinformation, evasions, lies, fronts and things people cannot articulate; respondent's reluctance to share things, discuss sensitive issues, go against norms. [Guba, 1979, pp 62]

Collection of data strategies.

Several strategies for the collection process were used. In accordance with the qualitative research domain, it was important that data was collected from many appropriate sources, a variety of collection methods employed and guidelines and rules for gathering data established. Some data collection sources include notes from interviews and observations, edited summary notes of interviews and observations, records of meetings and correspondence about the research with the designated supervisor, all documents/literature/newspaper articles used as data sources, guidelines used for content analysis of documents/literature/ newspaper articles, decision rules for the categorisation of data, interview guidelines and the questionnaire format.

Other strategies used in data collection are *nominal measurement*, to ensure that the process of partitioning objects clearly in two or more categories resulted - e.g. *retired executives* - sex, retirement age, employment area, leadership area.

Credibility of data is an important issue. Data collection, particularly when concerned with information gathered from people and from organisations can offer confused and/or conflicting or biased information. For accurate research, it is vital that the "truths" of the collected data can be understood and interpreted. The utilisation of the following techniques have assisted greater understanding of and insight about the

collected data. An extended period of time, known as *prolonged data gathering on site*, enables the researcher to better understand, to become accepted and to see the situation against a better knowledge of the broader scene. Time also allows initial perceptions to broaden, and biases and attitudes to be better understood and accounted for in the completed report. *Triangulation*, the investigation of several sources of information and data, focusing on a common theme, permits common themes to emerge, while the accuracy of the information is verified and perceptions tested. Checking information collected with other knowledgeable sources and/or organisations is known as *member checks*. In this way, the credibility of the data is established. All feedback from this method is reliable. A file of material/data related to the findings and interpretations from each source and known as *a collection of referential adequacy material* was created and maintained. This included all relevant material, and over time it preserved a sense of context in which the findings were originally made, thus allowing better judgements to be made. As the study progressed it was helpful to be able to disengage from the research project site and discuss/confer with interested colleagues in a process known as *peer consultation*. Questions were raised and thinking on the topic expanded. The recording of this process and its feedback was stored for referral and use.

Questionnaire design and the construction of questions.

It was important for the study to have a sound questionnaire design. Oppenheim [1966:pp44] outlines the "Quintamensional Plan of Question Design", which states:

- * the questions are designed to discover whether the informant is aware of or has thought about the issue at all.
- * asks the general questions concerning the respondent's general feelings

on the issue.

- * tries to get answers to questions dealing with specific parts of the issue.....

- * asks questions designed to find reasons for the respondent's view

- * inquires how strongly such views are held.

The questionnaire construction was planned to inquire into and elicit information about the respondents' lifestyle, habits, background, experience and attitude, as well as how active is their participation in the community.

Foddy [1993: pp193] explains the "TAP" paradigm for constructing questions as:

The key principles.....can be summarised under the acronym "TAP". Since "tapping" valid, reliable respondent information is the primary aim underlying the use of questions in social research, the TAP acronym is a useful reminder of the three issues that researchers should keep in mind when they are constructing questions for interviews and questionnaires.

Topic. The topic should be properly defined so that each respondent clearly understands what is being talked about.

Applicability. The applicability of the question to each respondent should be established: respondents should not be asked to give information they do not have.

Perspective. The perspective that the respondent should adopt, when answering the question should be specified.

Both *open* and *closed* questions were formulated in the questionnaire.

"Chief advantage of the open question is the freedom that it gives the respondent.....Free response questions are often easy to ask, difficult to answer and still more difficult to analyse." [Oppenheim, 1966 pp41] "Closed questions can be attitudinal as well as factual."

[Oppenheim, 1966 pp42]. The disadvantages of closed questions are: loss of spontaneity, uncertainty about the respondent's own thoughts, possibility of being biased, loss of opportunity to probe and the diminished choice may not truly express the respondent's own ideas.

Oppenheim [1966, pp23/25] warns of five problems of questionnaire design.

1. Decisions concerning the main and auxiliary methods of data collection, such as interviews, mail questionnaires, observations and the study of documents.
2. The method of approaching respondents.
3. The build up of question sequences and the order of questions and other techniques within the framework of the questionnaire.
4. For each variable, the order of questions within each question sequence.
5. The use of pre-coded versus free-response questions.

Methods of data collection and analysis

Methods of data collection and analysis are important and essential to the outcomes of the research. Whenever possible *data was loaded into grids* for analysis. Data was put into *data banks*, then categorised before a hypothesis was developed and a finding concluded. Of vital importance to the study was the maintenance of the relevance and the focus of the *Research Question*. The research question was kept in focus and consistently referred to during the analysis and the interpretation of data.

Description of the Conceptual or Theoretical Framework.

The paradigm of inquiry used is the *naturalistic* inquiry method. It identifies the problem, reviews the literature, describes the instruments and the population, reports the treatment, presents and discusses the results and projects possible implications. A *naturalistic report* is written in ordinary language. 'It is based on trustworthy data collection and analysis procedures' [Burns, 1982 pp31]. The report is valid as "It must be plausible, carefully documented and provide corroboration from multiple sources" [Burns, 1982 pp33] "The naturalistic research report must be well organised and follow a clear plan of exposition. It should be 'jargon free' and descriptive. The report must be fair to all parties and ethical in its approach. The information/ data must be fairly obtained, while the safety, confidentiality and the rights of the respondents observed." [Burns, 1982 pp31/32]

The *framework* for this study is *people* focused and *value* driven. The aim is to provide structures and processes that enable the role played by retired school principals with the community to be clearly defined.

Conduct of the Study.

The study arises from the belief that retired school principals retain a range of leadership and management skills no longer applicable in their former workplace. Furthermore, the community has need of management and leadership expertise and retired principals need to find a lifestyle outside school that is satisfying and fulfilling; one where self esteem and empowerment are retained.

The aim of the research study is to determine the role and the involvement of retired principals in the community This research study is *practiced-*

based, working from a set problem through to its solution. It is a *participatory* research study, using research tools such as questionnaires, interviews, discussions and observations. Retired principals and the organisations' representatives are the major source of information. *Data is collected, analysed and interpreted* from the gathered material and the findings made. The research is a *collaborative* effort, with the researcher negotiating with the participants, and working actively with them to discover the truth of the situation. *Multiple sources of information* enable the exploration of many possibilities. Validation of data occurs due to the coherence of the gathered information and the insights gained by the researcher in the course of the research. Attention to detail and attentive observation enables the *interpretation of the data* with a greater understanding and meaning. Through *self reflection*, practical and strategic concerns are seen in context.

Case Study Approach.

The approach to the research was to work through six aspects of each interviewee's life: personal interests, work, leisure activities, organisational membership, self education and community involvement. The aim was to discover what their pre-retirement interests, activities and skills were, what carry-overs, changes and adaptations were and what new interests and challenges were encountered in retirement. It was important to ascertain the direction their personal interests, thrusts and enthusiasms took them as retirees. Fifteen retired school principals were individually interviewed, using a prepared questionnaire. The responses were recorded and analysed, interpretations made and conclusions drawn.

The implementation of the research plan was designed in the following stages:

- Stage 1.** Identification, location and availability of data sources.
- Stage 2:** Establish credibility and trustworthiness.
- Stage 3:** Ethical considerations.
- Stage 4:** Data collection
- Stage 5:** Analyse and interpret data.
- Stage 6:** Draw conclusions from gathered data.
- Stage 7:** Summary of the study. Monitor and review conclusions. Rethink, reflect, discuss findings, replan, look for understandings, consider the learning process and the knowledge gained.
- Stage 8:** Write the research report [Thesis].

Research questions reviewed.

The study evolves around a main *research question* that asks, *What role is taken by retired school principals in the community?* and two *subsidiary questions* that inquire into, *What retained leadership skills do retired school principals use in the community?* and *How does the community benefit from retired school principals' active participation and involvement in community activities?* The questions asked to the case study recipients in the prepared questionnaire were planned so that positive responses could be elicited, information collected and analysed and used as a basis for the research.

Each case study subject was asked to respond in an interview to a series of questions:

- 1.i Position held in the work force.
- 1.ii Educational attainments and qualifications. [at retirement]
- 1.iii General interests/community involvement. [at retirement]
- 1.iv Age and date of retirement.
- 2.i Self education since retirement.

- a) purpose of self education.
- b) uses made of this education.
- 3.i Leisure activities pursued after retirement.
 - a) as a participant.
 - b) as a leader/initiator.
- 4.i Organisation belonged to after retirement.
 - a) membership level [member/executive/committee member]
 - b) action taken.
- 5.i Main interests.
- 5.ii Area and level of expertise.
- 5.iii a) level of participation in these interests.
 - b) actions taken.
- 6.i Work [type & hours/week].
 - a) paid - reasons for working [hrs/week].
 - b) voluntary - reasons for working [hrs/week].
- 7.i Community involvement. [type/description].
- 7.ii Level of involvement.
 - a) as an individual.
 - b) within an organisation.

Assumptions and limitations.

There are assumptions and limitations that are components of any research study. These affect the direction the research takes and the methodology used for that research.

The following *assumptions* of the research are identified. The study was developed in the belief that research is centred around a question that demands an answer. On identification of the problem, a specific goal was stated and a structured and systematic format or plan was set in place.

Through logical development, generalisations, principles, theories and hypotheses are formulated. This is an interactive process, where all gathered data is interlinked to enable a solution to the problem. School principals have certain skills and knowledge that equip them to be successful leaders, managers and administrators. They maintain strong interpersonal interaction and communication networks. They have the ability to formulate and implement policies and programs. They are committed to on-going professional development. Therefore, it is assumed that in retirement, these people retain their skills and knowledge, and in most instances use their abilities to interact and participate in their communities. It is also assumed that retired principals maintain an active interest in self education and retain their interest in the world and in community concerns and matters.

In such a research study *limitations* are imposed. These are that only retired school principals are included in the study group, leadership skills will be emphasised, and the transference of these skills to community based activities will be especially noted. The extent of community influence will include self education, political action, economic equity and social activities and pressure. The geographical area will be limited to the Metropolitan East Education area in New South Wales.

Conclusion.

The result was a study based on qualitative methodology and naturalistic research methods, with research being conducted through interview and the development of case studies. Responses from a prepared questionnaire used when interviewing the respondents provided sufficient accurate and useful

data to analyse, interpret and draw conclusions. These responses provided answers to the problem set by the research and subsidiary questions, thus enabling the thesis to be developed.

CHAPTER 4

INTRODUCTION TO THE CASE STUDIES

Introduction

Fifteen case studies have been completed. The subjects are retired school principals. These retired principals have had long careers in school executive positions in relation to their total years of service. Why is this? They taught in an education system of merit placement that identified and rewarded teaching expertise, personal drive and perceived leadership qualities. As promotion was by a seniority list, the process worked as a "teaching /leadership screening process". Teachers in schools on a "merit list" were nurtured and given responsibilities over and above their classroom responsibilities.

Prior to interviewing the retired principals, a questionnaire was planned that would enable the subjects to provide information about *the role taken in the community by retired school principals, the retained leadership skills used by retired school principals within the community and the ways the community benefit from the active participation and involvement of retired school principals.*

Each interview was conducted face to face. An informal approach was taken, with questions asked and notes taken during the interview. As time was not an issue, the subjects had the opportunity to expand on some of their answers, thus giving greater depth to their roles and lifestyles. Each respondent was eager to discuss his/her present lifestyle, and refer other acquaintances as subjects for the project.

The people, who became the cases for this project, are enthusiastic and energetic, articulate, well organised, intelligent, in good health and self funded retirees. They have worked and/or lived in the same area for a considerable length of time, and are reasonably well known in their local community. They qualify as case study subjects because they have lived or worked in the Metropolitan East Education Region In New South Wales.

All have outstanding or special talents or skills. Their strength, expertise and effectiveness lie in the area of educational leadership, communication, management of people and work teams, development of networks, decision making, organisation of people and resources, time management and finance and budgeting skills. The over-riding feeling throughout the interviews was that these people *really cared about people*.

Generalisations were made on the data gathered at these interviews. No "non-active" former principals were identified. Consequently, the issue of non-participation in the community has not been considered. However, non-participation in the community by former principals cannot be discounted, and in further studies a wider sample must be considered.

Relationship between the Literature based review and the Case Studies.

The literature based review, although not precisely on the topic, "The Role played in the Community by Retired School Principals", provided background that initially suggested a direction to follow and questions for inclusion in the questionnaire used for the interviews, and later suggested a base that helped make sense of the subjects' answers during the analysis and interpretation stage of the study.

The literature 'on retirement' expressed the ideas that all people

eventually retire, there is an adjustment period all new retirees face in the transition from work to retirement, and that the ingredients of a successful retirement are good health, adequate finances and keeping mentally occupied.

'On community' literature expresses the view that active retirees focus their energy, time, skills and interests on community leadership, but the roles they accept must be relevant to them, experiential and practical. Readings also show that to maintain an active role in the community, retirees must have advice on options for leisure activities and be given the opportunity to participate in voluntary and/or paid work.

The literature 'on ageing' views a wide spectrum of concerns and issues arising from an aged society. It shows a society where the 'aged' are active and concerned people and who are involved in and affect everyday living.

Conclusion

The purpose of the prepared questionnaire and face-to-face interviews with the respondents was to inquire into their lifestyle that developed during retirement, their function in the community, their relationship to the community and the need the community has for their expertise, experience and skills.

CHAPTER 5
CASE STUDIES
AN OVERVIEW AND ANALYSIS

Case Study 1

General information.

The subject for Case Study 1 is a male, former secondary school principal. He has been retired for 6 years [1992]. He held executive positions for 27 years [69% of his teaching career] in country and metropolitan schools. His educational attainments are Teachers Certificate and B.A. Dip Ed.

Personal interests and strengths.

His personal interests include theatre, reading, music, photography, gardening, walking, travel, home and car maintenance and family. He has special knowledge and skills in photography, video operating and editing, map reading and computer competency. His communication skills are well developed with literacy strengths in writing/understanding, oral communication and public speaking. His strengths lie in educational leadership, with a capacity for management of work teams, interviewing techniques and interview management, communication networks, decision making, liaison with individuals and groups, the preparation of submissions, the organisation and management of workshops/seminars, prioritising, and the appropriate use of authority.

Work. Paid. He taught casually. Reasons given include financial need and the difficulty to separate from school.

Voluntary. He works for the Jannali Uniting Church Neighbourhood Care Centre. Each week he provides transport, taking elderly people to respite care and friendship activities. He assists with lunch

preparations. He states that he does volunteer work to make use of his spare time, to provide a service to the community, and to access a section of the community/region not readily accessible to all. The skills used in schools are similar to those used in voluntary work, but are applied to different clientele, mainly volunteers.

Organisational membership.

He is a member of Rotary. At Club level, he is a board member and an active club participant. At District level, he is the Chairman of the Youth Science Forum, held annually in Canberra, and a sub-committee member of the Rural/Urban Exchange. He is an active committee member of Probus, acting as editor of the monthly newsletter, photographer, club historian and walking group co-ordinator.

Community involvement.

His involvement with Rotary, Probus and the Jannali Uniting Church is community based, and provides assistance to a wide range of people across the local community.

Benefits gained by personal involvement: He has a lifestyle pattern that brings enjoyment, fulfilment, social contact, personal satisfaction and stimulation. He creates an outlet for personal enthusiasms and drive while satisfying his need to offer community service.

Benefits gained by the organisations: The organisations profit from his interest, range of skills, expertise, knowledge, networks and a personal drive that he uses to the benefit of the Club/group activities and projects.

Benefits gained by the community: The whole community gains from the many services provided by the organisations in which he is involved.

Analysis of Case Study 1.

This subject uses leadership skills of working team management,

organisations, communication, personal interaction and networking. He has the ability to disseminate information. He has personal drive and enthusiasm. His interests, leisure activities, voluntary work and community service evolve around his affiliation with two community orientated organisations, Rotary and Probus. He is dedicated to, and involved in, the management, organisation, projects and activities of these organisations.

His involvement with Rotary, Probus and the voluntary work for the Jannali Neighbour Centre give him a role in community based organisations where his leadership skills are used for the betterment of these organisations. He gains immense personal satisfaction and fulfilment from the voluntary work. The whole community benefits because of the effort, leadership, expertise and knowledge he gives willingly to these organisations. With planning, this is how he envisaged his retirement to be.

Case Study 2.

General information

This subject is a female, former primary principal. She has been retired for 6 years [1992]. She held executive positions in metropolitan primary schools for 26 years [70% of her teaching career]. Her academic attainments are Teachers' Certificate and B.A. Dip Ed. She is interested in and is an activist for environmental and women's issues.

Personal interests and strengths

Her interests are reading, bushwalking, entomology studies, womens' issues and environmental studies. She relates well with people and is aware of and responsive to their needs. Her concerns are about environmental awareness, and conservation education for children and adults. She has a

propensity for action and litigation. Her strengths lie in educational leadership, with major skills being the management of work teams, the development of communication networks [oral and written] and organisation and management which includes decision making, finance and budgeting and file and record maintenance.

Work. Paid. She tutors adult migrants in English and school children in Mathematics, supervises School Certificate and Higher School Certificate examinations and works on State and Federal elections. She works for interest, but after losing her home in the 1994 bushfires, she needed additional income during rebuilding.

Voluntary. She works for the Sutherland Environment Group. She takes political action on environmental issues: opposition to the nuclear reactor at Lucas Heights, sand mining on the Kurnell peninsular, the megatip at Menai, the overhead power/telephone/TV cables in the Sutherland Shire and support for the use of public transport in an effort to reduce environmental pollution. Her counselling work with the Uniting Church at Jannali assists many people in the Sutherland Shire, especially the aged and victims of the 1994 bushfires.

Organisational membership.

Membership of the Society of Growing Australian Plants provides enjoyment as well as increased knowledge. Through the Sutherland Business and Professional Womens' Club, she promotes womens' issues. She is a founding member of the David D Steed Foundation, a member of the NSW Society of Entomology and a member of Probus. In all except Probus she holds positions on committees and fulfils other executive positions such as treasurer, newsletter editor and litigation counsellor.

Community involvement.

This subject participates actively through her organisational membership

and her voluntary work in the community. As an activists she is continually fighting for the betterment of community conditions.

Benefits gained by personal involvement: Active involvement and commitment to work and to the organisations gives a positive outlet for her enthusiasm and drive. It provides her with a social network of friends and people of like interests. It enables her to maintain contact with a wide cross-section of the community.

Benefits gained by the organisation: She brings to each organisation a range of skills and expertise in management and organisation, communication, decision making, financial expertise and budgeting. She brings to her network of friends and acquaintances her enthusiasm and her drive to motivate, to stimulate the organisations' activities and achieve set goals.

Benefits gained by the community: The community gains an active and politically motivated person who believes in, and supports the causes and activities of the organisations. She is prepared to give her time, support, energy and leadership skills to further the organisations' goals in the community.

Analysis of Case Study 2.

The respondent in Case Study 2 has leadership skills and strengths in the area of organisation, management, decision making, litigation, finance and budgeting and communication. She is a political activist and exhibits concerns for the environment and people in need. Her role in the community is one of fighting for community rights and improvement, and of support of people in need. The demarcation between her interests, leisure, self education, work, organisational membership and community involvement is difficult to define. Her active participation in the many organisations to

which she is affiliated reflects her interest and activism in environmental issues, womens'' issues and concern for people in general. She found adjustment to retirement difficult, with its changing role and lifestyle. She had to recognise that "work was finished". Changes were difficult to accept. School had been the focus of her life. Initially, she went from being a busy and fulfilled person to one not at all busy and certainly not fulfilled. Since retirement, she has created a satisfying lifestyle built around community participation and service, and focused on personal fulfilment.

Case Study 3

General information.

The subject for Case Study 3 is a female, former primary principal. She has been retired for 5 years [1992]. She held executive positions in metropolitan schools for 22 years [67% of teaching career]. Her educational attainments are Teachers Certificate and Grad. Dip. of Performing and Expressive Arts.

Personal interests and strengths.

Her personal interests include reading, music and family. Her special knowledge and skills are music and theatre production. Her communication skills are well developed. Her ability to lead and to work within a work team is a major strength. She is skilled in organisation and management.

Work Paid. She taught casually as she enjoys working with children.

Voluntary. She works with "the Regals", a community light opera theatre. She has a passion for directing musicals, but works in theatre administration, back and front stage and ticketing. She organises and teaches adult craft groups. She states that she has empathy for the community and understands its needs

She finds that the skills used in her paid and voluntary work in the community are skills and abilities she used in schools. However, greater tact, empathy and understanding of individual creative and expressive needs was required to stimulate and support volunteer performers and craft group members. She effectively and efficiently runs the organisations in a friendly but co-operative work relationship. The authority used maintains and instigates discipline that assist all to organise their own lives around the needs of the group.

Organisational membership.

She is an active member of "The Regals", a light opera company based at Rockdale. As previously noted, she is totally involved in this organisation.

Self education.

Since retirement she has commenced a university degree [B.A] in medieval history/English/religious studies/archeology/art in religious studies. She attends courses in porcelain doll making, quilting and patchwork. These provide mental stimulation and an outlet for her creativity.

Community involvement.

Her leadership role as a voluntary worker with the "Regals", a community theatre group and with the church craft groups give her a wide community base.

Benefits gained through personal involvement. Through the Community theatre group and the craft groups, she gains personal fulfilment, enjoyment, interest and a wide network of support and friendship. She is able to channel her leadership ability and creativity, thus giving her satisfaction as well as being of assistance to others.

Benefits gained by the organisations. Her creativity, personal drive, and

ability to work as both leader and team member provide the organisations with management, organisational, financial and budgeting knowledge that makes it possible for these voluntary groups to function successfully within the community.

Benefits gained by the community. A community theatre provides entertainment and enjoyment for community members. For talented and interested community members there is a program of well organised and viable theatre productions in which they can participate. The Craft groups provide the community with an organised activity that allow community members to explore and develop their creativity as well as give them social contacts and friendship.

Analysis of Case Study 3.

This subject has leadership skills in communication, organisation and management, team leadership and membership, finance, budgeting and resource management. She is a creative and talented musician who is prepared to share this talent with others. Her personal drive, enthusiasm and ability to form lasting networks and friendships is a major characteristic. Her role in the community is one of creative leadership, bringing craft and theatre to local people.

Boundaries between interests, work, leisure, self education and community involvement are difficult to define. Each complement the other. With retirement came the need to "rebuild" or "recreate" her life, as the life she knew of school, theatre and husband [her husband died suddenly on the eve of her retirement] no longer existed. She bridged the barriers facing her, to create a fulfilling retirement.

Case Study 4

General information.

The subject for Case Study 4 is a female, former primary principal who held positions as Consultant [primary Social Studies] and school executive for 23 years [63% of her teaching career]. Prior to retirement, she taught in metropolitan schools. She has been retired for 5 years [1992]. Her educational attainments are Teachers Certificate, B.A., Dip of Adult Ed.

Personal interests and strengths.

Her personal interests include reading, music, theatre, gardening, travel, walking, dining out with friends and family. Her communication and literacy skills are well developed. Her strengths lie in educational leadership, with major skills being organisation, communication, teaching, management of people and resources, team leadership and membership and interpersonal skills. She is innovative and has the ability to implement plans and programs. She says she has the ability "to see the big picture - not just the small one", particularly in factories [where she taught English to migrant workers].

Work. Paid. Forming her own consultancy she contracts work in factories, teaching basic English to migrant workers. At TAFE she teaches English to adult migrants. She formed her own company "Aussie Picnics" to supply lunches to archeological digs.

Voluntary. She works at the NSW State Library. She says her on-going care of her grandchildren is her most important work, as she enjoys forming a positive and caring relationship with them.

Organisational membership.

She has continued membership of the St George Chapter of the Australian College of Education. She does not see herself as an "organisational person".

Self education.

She has pursued a dynamic self education path since retirement, attending WEA courses in Computer Studies and French language. She has completed a university degree - Graduate Diploma of Adult Education [UTS]. These courses are basically to increase her skills and give her formal qualification for work, but they also give her enjoyment in her leisure time as well as provide a mental challenge. She states that the educational courses help her to relax, and she finds it "jolly" to learn about something new, whilst raising her self esteem.

Community involvement.

Her community involvement is restricted to her work with adult migrants.

Benefits gained by personal involvement: Personal contact with adult migrants give her insights into the difficulties these people face daily. The joy she experiences when more proficient English enables them to obtain better status and paid jobs is immeasurable.

Benefits gained by the community: Adult migrants gain personally by becoming more proficient at English, thus being able to participate more fully at work and in their community. No longer being dependent on other family members for English, their self esteem increases as they gain greater independence.

Analysis of Case Study 4.

This study has leadership skills of team management, communications, personnel interaction and networking. She is innovative, has great drive and enthusiasm, a keen sense of humour, and an interest in, and commitment to all she does. Her work, leisure, self education have a common thread or interest. The boundaries are difficult to determine. Her role in the community is one of program organiser and teacher of adult migrants, in

both the work place [factory] and at TAFE. The leadership skills she brought from school adapted well for her new role in retirement. She felt a loss of status on leaving the school's principalship. There was a need to find a new and different direction to her life. Through her commitment to community adult education, she has found that new direction, giving her a sense of satisfaction and fulfilment, while simultaneously providing a valuable community service.

Case Study 5

General information

The subject for Case Study 5 is a female, former primary principal. She has been retired for 5 years [1992]. She held executive positions in metropolitan schools for 25 years [63% of her teaching career]. Her educational attainments are Teachers Certificate, B.A. and Grad Dip of Education [Curriculum Studies]. In 1972, she participated in the Teacher Exchange scheme in England [Teesside Authority]

Personal Interests and strengths.

Personal interests include theatre, ballet, reading, travel, education, Business and Professional Women's Association, genealogy [her family history], cultivation of friendships, attending literary lunches, exploring Sydney, developing computer skills and knowledge and participation in the local Meals on Wheels service. Her skills and competencies include the ability to inquire, organise, categorise, research and communicate as well as computer literacy. Her participation in these interests is as an individual as she feels she cannot at this stage fill a leadership role due to her elderly parents' needs in Wagga Wagga. [She spends one to two weeks each month attending to her parents' needs]

Work. Paid. The supervision of HSC examinations.

Voluntary. She assists with the local Meals on Wheels program. She states that by working for the local Meals on Wheels, she shows her appreciation for a service that enables her parents to remain in their own home. She feels that she was extending this service to other elderly people in the community.

Organisational membership.

She is a member of the Liberal Party. This allows her to express a political point of view, provide contact with people of similar interests, and give her knowledge. Membership of the Botany Bay Family History Society provides information and access to family history records, introduces her to people who have a passion for family history while satisfying her own curiosity and interest.

Self Education.

She attends computer studies programs and genealogy programs.

Community involvement.

The major achievement, she cited, was her submission and confrontation with Kiama Council to name a community park [land developed and donated to the Council by her uncle, an original settler at Werri Beach]. Success was hers, and the park was named after the property's name.

Benefits gained by personal involvement: Her participation has been a "personal voyage of discovery", fulfilling a need for stimulation, an outlet for personal drive and enthusiasm and a need for social networks and friendships.

Benefits gained by the organisations: Organisations have gained an active and interested participant and a willing worker.

Benefits gained by the community: She does not feel that she has a

leadership role in the community. All her activities and interests are personal and based on her own needs. She sees her role within the community as participatory.

Analysis of Case Study 5.

This subject participates in community based activities, but has refrained from accepting a leadership role due to her commitment to the needs of her elderly and frail parents and her regular absences from Sydney. Her strengths are in the area of communications, networking, organisation, inquiry and research. The demarcation between interests, work, leisure, self education, organisational membership and community involvement is difficult to define. Her goal has been to develop a way of living that can cope with the demands created by elderly and frail parents, while maintaining an enjoyable, satisfying and fulfilling retirement lifestyle.

Case Study 6

General information

The subject for Case Study 6 is a male, former secondary principal, who was retired on medical grounds [brain aneurysm] 12 years ago [1986]. He held executive positions in country and metropolitan schools for 27 years [72% of his teaching career]. His educational attainments are Teachers Certificate and B.A.

Personal interests and strengths.

Personal interests include travel, scouting, reading, gardening, family and world affairs, RSL Social Club, Australian history, and being a carer for the elderly and the needy. His involvement with the St Vincent de Paul Society extends for over 50 years. Special knowledge and skills are in educational leadership, encompassing communication, decision making,

literacy strengths, organisation and management of personnel and resources. He has the ability to influence people through his sincerity and personal approach. He states he is a sincere Christian.

Organisational Membership and Work.

Voluntary. He worked at the San Miguel Rehabilitation and Refuge Centre at Richmond [7 years full-time] where he was responsible for management, resource organisation, budgeting, child and family care, counselling and home and yard work. He helped to develop work skills in the clients and assisted them in finding independence and a place in the work force. He works for Meals on Wheels, organising the roster for meal delivery. He is a member of the Carers' Association of Sutherland. In this capacity he visits, counsels and advises the home bound elderly on government benefits. He assists in ways such as driving people to the doctor or shopping etc, and doing tasks around the house that they can no longer do for themselves.

His interest and work evolve around the St Vincent de Paul Society. He works voluntarily as a Director at State and National level, where his expertise in the areas of planning, budgeting and organising resource management is required. At a local level, he works as a counsellor, assessor of need, organiser and distributor of resources. He says that he found the skills needed in voluntary work in the community similar to those required in schools, but a more humanitarian approach was necessary, as the aim was to help others. He finds that the volunteers assisting and the clients receiving help and benefits need to be approached with a different perspective, so that the approach to clients is personal and compassionate, a friendly work relationship with the volunteers is maintained, an effective dissemination of information is made while effectively using organisational and managerial skills to produce a cost

effective operation.

Interests and Leisure.

He considers that leisure time to be time for his home and family. He enjoys reading, gardening and travel. He participates in the RSL Senior Citizen group social activities. As a member of the Kogarah Historical Society he pursues an interest in Australian history. He attends meetings, writes article, participates in seminars and visits historical sites. These leisure activities keep his mind stimulated.

Self Education.

He has attended TAFE courses for Carers, which assists him in his voluntary work with the sick and the elderly.

Community involvement.

This subject is totally involved within the community. Through the Vincent de Paul Society his community involvement encompasses local, State and National commitments. However, his wide range of interests extends his influence across the community.

Benefits gained by personal involvement: As an organisational member, he is able to maintain and stimulate interest in the care and welfare of people. This enables him to use his organisational, managerial, budgeting and counselling skills, which are his strengths. They provide a network of contacts and long term friendships that he values. They give him the opportunity to share activities with his family and provide travel opportunities.

Benefits gained by the organisations. The organisations with which he is associated have gained a committed and sincere person, who is willing to share his time and his expertise at no cost to them. Because of his extensive network of friends and acquaintances, he is able to bring skilled and caring people into the organisations, thus increasing and

improving the workforce available.

Benefits gained by the community. A large section of the community is served by the care of the St Vincent de Paul Society. The elderly and the home bound in the Sutherland Shire are catered for by his active participation in the Meals on Wheels organisation and the part he plays in the Carers' Association of the Sutherland Shire.

Analysis of Case Study 6.

This subject exhibits a strong Christian belief in caring and help, and in his retirement years, he has used his skills in communication, resource management, finance, budgeting, counselling, management and personal drive and conviction to assist the elderly, sick and needy in the community. He has a genuine compassion and concern for the needy and commands an extensive network of resources/knowledge that can be used to assist them.

His interests, voluntary work, self education and community service evolve around his affiliation with the St Vincent de Paul Society, the Carer's Association of Sutherland and Meals on Wheels. He takes a leadership role in these organisations, using example and team work to encourage and support other workers.

His leisure activities, RSL Senior Citizen Group and the Kogarah Historical Society' provide personal enjoyment, social contacts and friendships, keep his mind active and stimulated and provide the opportunity to travel.

Case Study 7

General information.

The subject for Case Study 7 is a male, former primary school principal.

He has been retired for 7 years [1991]. He held executive positions in metropolitan schools for 20 years [57% of his teaching career]. He worked full time as a NSW Teachers Federation officer, in country and metropolitan areas for 2 years, but returned to the teaching service. His educational attainment is a Teaching Certificate.

Personal interests and strengths.

Interests include reading, travel, punting [horse racing], bowling and family which he regards as "the centre of his world". He is involved with the Vincent de Paul Society, NSW Retired Teachers Association, RSL Social Club, land development, environmental issues, Meals on Wheels and the Toyota 4WD Club. His special knowledge and skills lie in the area of communication, mathematics, driving, organisation, developing personal relationships and networking. He has converted recently to Catholicism. He holds a strong religious belief of social justice and is prepared to work actively towards this goal. He is an activist, prepared to take action in areas of strong convictions. He states that he "works as a watchdog, is aware of what is happening, and takes action when needed". He is articulate, speaking at environmental community meetings and being nominated by the local Council to give evidence in a Land and Environment Court action about land development.

Work. Paid. He is involved in the development of land and the construction of a block of units at Miranda.

Voluntary. As a committee member, he works for the St Vincent de Paul Society as a counsellor, needs assessor, driver, food packer and distributor. He visits and cares for aged patients at a local Nursing Home. He holds an executive position within the local Council Precinct, attends Precinct meetings and takes positive action on issues that are important to the Precinct. He works as a roster organiser and delivers for Meals on Wheels. He enjoys voluntary work, stating that the work fulfils

his idea of community justice and sits well with his religious beliefs. In retirement, he has the time and the opportunity to do this work. His strengths and skills allow the efficient running and organisation of the projects undertaken, maintenance of friendly and co-operative work relationships and effective counselling to take place.

Leisure.

He considers the work he does as leisure. Other leisure activities include reading, travel, the Toyota 4WD Club and the RSL Seniors Club. He finds personal enjoyment in these activities whilst maintaining awareness of local community issues and needs.

Organisational membership.

He holds memberships in Probus, RSL Seniors Club, Retired Teachers Association, St Vincent de Paul Society and the Catholic Church. He is a committee member of the Retired Teachers Association and is a regular representative on NSW Teachers Federation work groups. He is a Committee member of the local St Vincent de Paul Society. He works as a counsellor, and assessor. He drives the truck to pick up pallets of food from the depot, and assists with the packing of food for individual distribution.

Community involvement.

He maintains community awareness, commitment and involvement through the organisations he belongs to and the voluntary work he does. He says he "has a compulsive need to participate actively in local community affairs".

Benefits gained by personal involvement. Membership to these organisations stimulates and maintains personal and active interest in the community. It provides friendship and social networking. It provides an outlet for personal drives and enthusiasm. It maintains contact with a broad cross-

section of the community.

Benefits gained by the organisations. Through membership, the organisations gain a range of skills, knowledge, expertise, networks, and drive which are provided without cost to the organisations. This can be used to benefit the organisations' activities, projects and other members.

Benefits gained by the community. The local community benefits through the charity work conducted by the St Vincent de Paul Society. Involvement with the NSW Teachers Federation committee and work groups allows the Seniors' view to be expressed in educational matters concerning the youth of the state. Social groups like the ESL Seniors Club and the Toyota 4WD Club provide social outlets for the community across all ages. As an activist, he is a fighter for a better community.

Analysis of Case Study 7.

This subject is an activist within the community. He is concerned, articulate, well organised and cares about people and the environment. The demarcation between work, leisure and community involvement is difficult to define. This subject has developed a retirement lifestyle that is enjoyable and satisfying to himself and helpful to people in need in the community.

Case Study 8.

General information.

The subject for Case Study 8 is a female, former primary principal. She has been retired for 10 years [1988]. She came late into teaching, having been left a widow with three young children. She returned to High School to complete her Leaving Certificate before attending Teachers College. She held executive positions in metropolitan schools for 12 years [67% of her teaching career]. Her educational attainment is a Teachers Certificate.

Personal Interests and Strengths.

Her interests are genealogy, research and the understanding of archival material, gardening, sewing/embroidery, quilting, family/aged parent, care of grandchildren and church interests and activities. Her strengths lie in teaching craft groups and public speaking. She is computer literate. Her writing and literacy skills are well developed. She is an expert and capable sewer. Her skills include teaching, decision making, organisation, resource management, budgeting, creating personal networks and friendships. She is fascinated with a set of old diaries [circa 1880] written by Lady Eliza O'Connell, wife of the Acting Governor of Queensland. She aims to publish an annotated version of the diaries.

Work. Paid. She teaches as a casual teacher, organises the supervision of the HSC examinations, supervises School Certificate examinations and teaches professional quilting classes locally and at Mittagong.

Voluntary. She works as a guide at the Power House Museum, teaches scripture in schools and conducts craft lessons for adult groups. Reasons for working include the need to augment her income, for personal stimulation and enjoyment, to meet people and assist groups [church and schools] within the community with fundraising.

Skills used for work in the community are similar to those used in school, but now she is working with co-operative adults, who have their own agenda. She states that she generally takes a leadership role. She prefers to be "showing how" rather than "being shown".

Leisure.

Leisure activities provide personal satisfaction and enjoyment. Activities pursued are crafts/quilting/embroidery, gardening, holidays/travel, computer work, family commitments and visiting archives and libraries to

research genealogy interests. She finds these activities mentally stimulating. Leisure activities are shared with her husband [she has since remarried]. She needs the sense of belonging and commitment.

Organisational membership.

Organisational membership include the Botany Bay Family Historical Society, the National Trust and the Society of Australian Genealogists. She is an enthusiastic and active member. She shares in all group discussions and "show and tell" sessions. She speaks on archival and research findings. She declares that the members of these organisations are "all experts, leaders and organisers - there appear to be only chiefs, and no Indians." Her membership provides support and interest in the organisations' activities and projects. Her communication and literacy skills, organisation, expertise in research methods of primary and secondary material and presentation of materials benefit the organisations. Her readiness to assist with, and respond to questions is an asset.

Self education.

She has gained computer competency and awareness, has attended courses for guide training at the Power House Museum, and training courses for School Certificate and HSC. supervision.

Community involvement.

The subject is an active participant in the community, willingly giving her time and sharing her expertise and leadership ability.

Benefits gained by personal involvement. She finds the self education activities enjoyable and exciting, mainly because these are something she wants to do. The result is better work preparation, leisure activities and increased confidence and self esteem.

Benefits gained by the organisations. Because of her membership, she is

able to assist in a Church outreach program, bringing a friendship network to the parishioners. Her work has strengthened school community relationships, as well as assisting with a fundraising drive to buy musical instruments for the school band. She has created an interest in Australian history and genealogy research.

Benefits gained by the community. Public examinations are well run and supervised, and the community has an active and enthusiastic worker.

Analysis of Case Study 8

This subject has leadership skills in the area of teaching, personal relationships, communications, personal interaction, networking, and team and group management, resource organisation and budgeting. She exhibits personal drive and enthusiasm and is able to disseminate information.

Her interests, leisure activities, work, self education, organisational membership and community involvement evolve around her interest in Australian history, genealogy and a creative talent in crafts/quilting and embroidery. Leadership ability is used in these area. She gains personal satisfaction and fulfilment from her work in the community, helping people find an enjoyable way of spending their leisure time while developing new and possibly lasting friendships. Her work in the community has given her the opportunity to make contact with people who hold different perspectives. She finds that retirement life is challenging, fulfilling and enjoyable.

Case Study 9

General Information.

The subject of Case Study 9 is a male, former SSP school principal [a school designated for pupils with intellectual and physical difficulties].

He held executive positions for 27 years [69% of his teaching career in country and metropolitan schools. His educational attainment is the Teachers Certificate.

Personal interests and strengths.

Personal interests include theatre, the National Trust, bird watching [ornithologist] and overseas travel. He is involved with the Teachers Federation Council [approx. 20 years], is member of the Botanic Gardens and member of the RSL [he was in the Occupied Forces in Japan [1947-8] Interim Army - Cypher section and also in the Vietnam War]. He is a member of the Retired Teachers Association [Secretary], attends WEA classes, and is a member of BCOF [British Commonwealth Occupation Forces - Hon Secretary and organiser of reunions. The skills he uses include organisation, the ability to network with other people and groups, team management, communication and having a high level of oracy and literacy.

Work. Paid. Paid work is limited to the supervision of University examinations.

Voluntary. He is the Secretary of the NSW Retired Teachers Association, and works on committees representing this association in curriculum, political action and social matters.

Organisational membership

As secretary, he participates actively in the Retired Teachers Association. He represents the Association at Council, on the Board of Studies and on educational and political committees. On age discrimination issues, his work with the Retired Teachers Association resulted in changes to the Age Care Bill in NSW Parliament. Broader issues are concerned with the conservation and preservation of Cockatoo Island and other Sydney Harbour islands, as well as saving the ABC. These action resulted in the State and Federal government's change of attitude and views and legislation changes. He is a member of the RSL and the hon. secretary of

BCOF [British Commonwealth Occupation Forces].

Self education.

He participates in WEA classes in architecture, history and languages and attends literary lunches. He enjoys learning and finds the experience liberating as it takes him into "another world". He finds it a way of avoiding isolation and boredom. It provides personal satisfaction, growth, and an understanding of the world. He feels he is a more alert and knowledgeable person in the community and is able to have a diversity of viewpoints.

Community involvement.

His community involvement is the result of the organisational membership affiliations with the Retired Teachers Association, the RSL and the BCOF association.

Benefits gained by personal involvement: His involvement and commitment to the work of the organisations to which he belongs, give him a positive outlet for his organisational skills, enthusiasm and drive. It provides the opportunity to maintain long lasting friendships and affiliations.

Benefits gained by the organisation: The Retired Teachers Association has a tireless activist who is prepared to work on committees and to fight for the issues and matters which are important to the Association.

Benefits to the community: The community gains an active and motivated person who believes strongly in the causes and activities of the organisations and who is prepared to give his time, support, energy and leadership skills to further them in the community.

Analysis of Case Study 9.

The subject, while being quietly spoken, has an air of authority. His passion for the work of the Retired Teachers Association and the political

and social action it practises is quickly recognised. The fact that he is a major power source, organiser, negotiator, communicator and team manager of this organisation is not readily recognised. He carries his work load lightly and faces every challenge as a personal stimulus. The leisure activities and major interests he has gives him a satisfying and fulfilling retirement lifestyle.

Case Study 10

General information.

The subject for Case Study 10, is a female, former primary principal, who has been retired for 4 years [1993]. She held executive positions in metropolitan schools for 31 years [81% of her teaching career]. Her education attainment is a Teachers Certificate.

Personal interests and strengths.

Her interests include a community choir, ballet committee, Australian College of Education, Stewart House, theatre [ballet, orchestra, piano recitals] craft classes, gardening, movies, travel. Special knowledge, expertise and skills are in music [piano, singing, theory], dance [teaching qualifications for ballet, tap, stage and modern], educational leadership, organisation and co-ordination, team leadership and membership, decision making, communication skills [oracy and literacy], interpersonal skills, meeting organisation and procedures, protocol, prioritising, time management, fund-raising and innovative ideas.

Work. Paid. She works full-time as Schools Liaison Officer for Stewart House. She travels to all State schools in NSW and ACT, speaks to students and staff and encourages them to support Stewart House financially. She has full responsibility for the organisation's fund raising and promotions. This work is important to her. She describes

herself "as the face of Stewart House in schools"

Voluntary. She is the musical director/organiser/secretary of a community choir. She has been on the Ballet Cecchette Medal Committee for 25 years, and is currently its treasurer. This committee auditions ballet students and awards scholarships. She is a regional organiser for Weight Watchers, responsible for the training and development of team leaders.

Organisational membership.

She takes a leadership role in many organisations. She is an executive committee member and Vice-chairman of the Australian College of Education [St George chapter], a member of the International Fund for Animal Welfare, and a committee member of a Ski Lodge. She works in a voluntary capacity with the community choir, the Ballet Cecchette Medal Test Committee and as paid officer of Stewart House [Committee member of the Stewart House Concert].

Community involvement.

Her community involvement arises from her active participation in work and organisations.

Benefits gained by personal involvement: She felt a loss of "status" on leaving the principalship role and found the changed situation difficult. Her subsequent involvement in the organisations mentioned has given her life a new direction, enables her to use her expertise and skills in a way that is meaningful and important to her, whilst making an important contribution to the community.

Benefits gained by the organisations: The organisations gain a committed, motivated and active person who uses her expertise and leadership skills for their benefit.

Benefits gained by the community: Through her work with Stewart House, the children of NSW and ACT are the beneficiaries. Cultural opportunities for

community members are provided with her commitment to music and ballet.

Analysis of Case Study 10.

This subject is an active and talented woman, who needed to find a new direction for her life on retirement. The demarcation between her interests, work and organisational membership is difficult to define as they merge into a lifestyle choice. Her leadership expertise and skills, her personal enthusiasm and drive and her need to "do a job properly and well" has led her into a role in the community that is demanding, and requires her total commitment. As a consequence she has regained a leadership status she felt she had lost on retirement from school.

Case Study 11.

General Information.

The subject for Case Study 11 is a male, former primary principal. He has been retired for 13 years [1986]. He held executive positions in metropolitan schools for 25 years [63% of his teaching career]. His educational attainments are Teachers Certificate, BA, and post graduate training as a school counsellor [1 year].

Personal interests and strengths.

Personal interests include scouting, church, bowls, theatre, stamp collecting, gardening, travel, family and family history, Probus and computer studies. Special knowledge and skills encompass communication [oracy and literacy], counselling, organisation, organisation of support groups, finance and budgeting, scheduling, negotiating, new philosophy of scouting and research skills.

Work. Paid. He has worked for State and Federal elections, the census and the checking of electoral rolls. He works to boost his present financial

situation and because he has a desire to be part of his community.

Voluntary. He is involved in the scouting organisation. At the local level he is the business manager and treasurer for the Kirrawee District. At district level, he is vice-chairman of the St George area, chairman of the Properties Committee and organiser of the Gang Show. At state level, he was the airport co-ordinator of the World Jamboree [1995], liaising with other Australian states and international countries. He is a Church elder, responsible for church organisation, finances and counselling. He is a member of Probus, where he acts as co-ordinator for bowls and as a leader for the walking group.

Voluntary work requires him to communicate, seek logical alternatives, be a decision maker, organise, negotiate and practise financial and budget strategies. These skills prepare him to seek effective outcomes and face challenges.

Interests and Leisure.

Major interest and leisure activities are bowls, scouting, computer work, walking, history, family involvement and travelling. These activities give him enjoyment, social contact and physical activity

Organisational membership.

He participates actively in bowls, scouting, Probus, the church.

Self education.

He has attended computer courses at TAFE. By listening to guest speakers and attending excursion organised by Probus positive educational opportunities arise.

Community involvement.

Most of his interests are concerned with his participation in community activities. His work with the scouting movement, and Probus extends across the local community.

Benefits gained by personal involvement: These activities give him enjoyment, social contact, mental stimulation and the opportunity to maintain his expertise and skills. He is pleased he has the opportunity to give service.

Benefits gained by the organisations: The organisations have gained the services of a man who is competent and skilled. He is committed to the organisations and he gives his time freely and generously.

Benefits to the community. Because of the depth of his interests, a diverse section of the community benefits from his participation in community based activities. Through scouting - youth; through Probus - senior citizens; through the church - a Christian outreach through bowls - a cross-section of the community.

Analysis of Case Study 11.

This subject participates in a wide and diverse spread of interests at executive or organiser's level. He has a sense of commitment and is prepared to give his time and his expertise. The demarcation between interests, leisure, organisational membership and work is difficult to define, as he has cultivated a lifestyle that incorporates all his interests and activities.

Case Study 12

General information.

The subject for Case Study 12 is a female, former primary principal. She has been retired for 8 years [1989]. She held executive positions in metropolitan schools for 25 years [71% of her teaching career]. Her educational attainment is a Teachers Certificate. The subjects of case study 12 and 13 are a married couple. Many activities within the community are shared and some are individually based.

Personal interests and strengths.

Personal interests include, church, rugby, family [elderly mother], education, music, reading, travel, theatre, tennis, family history, renewing and maintaining friendships. Her skills and strengths are in the area of communication, organisation and management.

Work. Voluntary.

Her work centres around her commitment to the church. She is a church elder, secretary of the Parish Elders Group and organiser of the carers' group. She is co-ordinator of the youth work at the church. This involves counselling, being the supportive adult and the organiser of all youth activities as well as the management of a team of supportive volunteers. She assists with most welfare activities. One of these activities was to head up the team to provide food and shelter during the 1994 bushfires. The skills required for this work are strong communication networks, management and organisation. She must show strength, tolerance and care for the people with whom she works.

Interests and leisure.

Leisure time provides the opportunity for her to renew her inner self. She enjoys travel, particularly to Rugby Golden Oldies international venues. She does extensive family history research, listens to music and socialises with a network of friends.

Organisational membership.

She is a member of the Australian College of Education [St George chapter], a foundation member of the Early Childhood Education Council of NSW [a member of the committee and is currently the treasurer] and a member of the St George Historical Society, where she works as a guide in the local community. She has connections with two churches; the Uniting Church at Hurstville [morning] and at Penshurst [evening]. She is the co-ordinator of the youth group, on the committee of Outreach, attends adult

fellowship, and as a church elder has the responsibility for the organisation of all the Bible study groups emanating from the church. She is a member of the Golden Oldies Rugby association, participating in international festivals. She is on the committee of the Port Hacking Vintage Ports [a Rugby team]

Self education.

She has attended courses on family history and a TAFE carers' course.

Community involvement.

Almost all her activities, leisure, interests, work, organisational membership and self education are centred around her participation in, and commitment to the community.

Benefits gained by personal involvement: She finds personal fulfilment by being involved in community based activities. Strong friendships and networks have been forged. She finds that she has developed a personal support group that assists her in time of need.

Benefits gained by the organisations. The organisations have gained a committed and energetic person who is willing to give her time, expertise and skills. Her ability to form friendships and networks within the organisations provides a base to develop cohesive work practices.

Benefits gained by the community. The community has a Christian woman who is committed to social caring. She is prepared to give her time and her skills to help people in the local community to better their lives. She has the ability to create friendships and supportive situations. Her willingness to accept an executive role in organisations provides a leadership base therein.

Analysis of Case Study 12.

The subject is a woman with a strong Christian belief of providing help

and care. She uses her energy, drive and her ability to form a network of friendship to assist her work in the community. She brings such leadership skills as organisation, management, communication and counselling to this work. In her retirement she has endeavoured to find a lifestyle that brings her enjoyment and satisfaction. The demarcation between the areas of interest, work, organisational membership and community involvement is difficult to define, as each area complements the other in building for her a "good life". Simultaneously, the local community benefits.

Case Study 13

General information.

The study for Case Study 12 is a male, former primary principal. He has been retired for 9 years [1889]. He held executive positions in country and metropolitan schools for 27 years [69% of his teaching career]. His educational attainment is a Teachers Certificate.

Personal interests and strengths.

His interests include rugby, church, Australian College of Education, education, theatre, travel, reading, family history and family. Special knowledge and skills are organisation, communication, research skills, networking with people, the ability to be a "handyman", rugby and general education.

Work. Paid. He has worked for the Federal Electoral Commission and as a general assistant in schools, doing general maintenance and caretaking.

Voluntary. He is involved with rugby union. He is a touch judge working at first division and international levels. He is the liaison officer for touch judges in both the country and metropolitan areas. He is the organiser of rugby reunions. He works as an usher for local amateur theatre productions. He has maintained his contact with schools. He is the patron of Bexley Public School, attending all the P and C meetings. He

takes the position of community representative on Blakehurst Public School Council [currently secretary]. He is on the committee that reviews the performance of public schools.

Interests and leisure.

He states that the work he does, and the organisations he belongs to, provide him with leisure time activities. He finds enjoyment and satisfaction from participation.

Organisational membership.

He is involved with rugby. He is a committee member of the NSW Referees Association [Rugby]. His role is to liaise with referees [Saturday and Sunday] in country and metropolitan areas. He is a committee member and reunion organiser for the St George Rugby Union. He is a life member of the Southern Districts/St George Rugby Club. He is on the committee and in the team of the Port Hacking Vintage Ports[a vintage Rugby team]. He is the organiser of the Golden Oldies international reunions. He is an elder in the Uniting Church with responsibilities which include organisation and management and counselling the youth of the church. He is the secretary of the St George Chapter of the Australian College of Education. He is on the committee that annually select two teachers' awards; the Norm Baker Educational Award and the Dr Alice Whitely Science Award. He is a member of the St George Historical Society and acts as a guide at Lidham Hall Museum.

Self Education.

All self education aims at improving skills needed in his work, leisure and organisational membership. He has attended courses concerned with computer skills, family history research, representative rugby and updating refereeing skills, Teacher Merit Selection, voluntary involvement program, and TAFE programs for carers and visiting the sick.

Community involvement.

All this subject's activities appear to be community based. Demarcation between work, organisational membership, leisure and interests is difficult to define and seem to complement each other as community based activities.

Benefits gained by personal involvement. This subject has diverse interests. His involvement has permitted him to use his expertise and skills. In doing so, he has created a friendship network that meets his needs, provides opportunities to travel, maintains his intense interest in all aspects of rugby, allows him to retain his contacts with school and education and continue a meaningful Christian life.

Benefits gained by the organisations. The organisations have gained a committed, energetic and sincere person who is prepared to give his time, expertise and friendship. Self education aspects are geared to make him more prepared to work for the organisations.

Benefits gained by the community. A broad spectrum of the community benefits from the efforts of this study. His participation in the church, and his care for the youth and the aged; his work in the schools and with education; his interest in, and promotion of rugby and its organisation across a wide age span; his active support of local community theatre; and his work with the historical society are all community centred.

Analysis of Case Study 13.

This subject participates in community centred activities. He gives his time, enthusiasm, energy and expertise willingly. The subject states that "he needs interaction with people". His influence is spread widely across

the community ranging from church affiliation, education, sport, theatre and historical aspects. In doing so, he has developed a personal and fulfilling lifestyle that crosses the boundaries of work, leisure, organisational membership and self education.

Case Study 14.

General information.

The subject for Case Study 14 is a male, former secondary principal. He has been retired for 8 years [1990]. He held executive positions in country and metropolitan schools for 28 years [80% of his teaching career]. His education attainments are B.Sc[Hons], Dip Ed.

Personal interests and strengths.

His interests include education, Rotary, reading, walking, fishing, swimming and family. Special knowledge and skills are educational leadership encompassing communication, decision making, team membership and management, organisation and management, finance and budgeting.

Organisational membership and Work.

Voluntary. His voluntary work centres around his Rotary Club affiliation. Since retirement he finds that he has time to give something back to the community. He is on the Rotary Board and on several committees. He is Chairman of the District Debating Competition of Secondary Schools [Yrs 9 & 10] [held in school time]. He adjudicates fourteen debates each year. He is the Chairman of the District Education Committee. He is the Registrar for the District Governor's Changeover and on the committee for the District conference. Fundraising is a major Rotary activity. He is prominent in all fundraising efforts.

Interests and Leisure.

He loves the outdoors. His leisure activities include walking [co-ordinator of a local walking club], fishing [treasurer of a local fishing

club], and swimming [on the committee of a masters swimming club]. He states that he enjoys physical activities but also participates for health reasons.

Community involvement.

He participate actively in Rotary and several sporting groups, accepting leadership roles in all organisations. While enjoying community participation he feels that it is his responsibility to support and assist the local community in any way he can.

Benefits gained by personal involvement. This subject views retirement as a time to do things for himself. He participates in outdoor, sporting and service activities because it brings him satisfaction, a purpose, friendship and total enjoyment.

Benefits to the organisation. He accepts the leadership role he takes within the organisations. He has the time, the health and the ability to participate in the organisations' management and activities. He has always been "duty bound" to give service. He transfers this "duty" to these organisations.

Benefits to the community. The community benefits from the many services that Rotary's fundraising and activities provide, and from the sporting associations with which he is affiliated.

Analysis of Case Study 14.

The subject of this case study has a strong sense of civic duty. Now in retirement, he is able to utilise his time in ways that bring personal fulfilment and satisfaction. He has leadership skills that are used through Rotary committees and activities to assist the community in many

ways, the main emphasis being on schools and youth.

The sporting clubs with which he is affiliated are community based. While assisting them in organisation and management, they give to him friendship, enjoyment and a sense of well-being.

Case Study 15.

General information.

The subject for Case Study 15 is a female, former primary principal. She has been retired for 10 years [1988]. She held executive positions in country and metropolitan schools for 27 years [77% of her teaching career.]. Her educational attainment is a Teachers Certificate.

Interests and strengths.

Her interests include theatre, films, art, reading, walking, Probus, National Seniors Association, travel, gardening, local radio, card playing and family. Her strengths lie in the area of communication, organisation and management, decision making and team management.

Work. Paid. She does casual teaching.

Voluntary. She works at the NSW State Library [filing in the archival section] and as a volunteer guide at the NSW Art Gallery. She works at a community radio station, preparing and presenting news programs and arranging and presenting interviews. She claims that she relates well with people and finds this work stimulating, challenging and personally enjoyable.

Interests and Leisure.

She states that leisure is being at home with her family or travelling in Australia or overseas. She does not view her membership and her involvement in the organisations' activities as personal leisure.

Organisational membership.

She is a committee member, publicity officer and co-ordinator of the walking group for the National Seniors Association. She attends conferences as this association's representative. She is a committee member, secretary, and co-ordinator of the card-playing group for Probus. She is a committee member of the Port Hacking Garden Club. She is on the programming committee of the local community radio, with responsibility for the co-ordination of morning interviews [organising people and times].

Community involvement.

Her voluntary work and organisational membership activities involve her directly with the community as they are community based. Her personality, communication skills and ability to make friendships provide her with the foundation needed to function within the community.

Benefits gained by personal involvement. Through work and organisational membership, she finds she is stimulated and challenged. She enjoys the social interaction of the people with whom has contact and has made lasting friendships with many. She is able to use her skills and expertise, and feels she is contributing positively to the community in which she lives.

Benefits gained by the organisations. The organisations have gained an outgoing and capable woman who can organise, set goals, plan and follow projects through.

Benefits to the community. As her main interest is with senior citizen organisations, the older people in the community are benefiting most from her active participation and involvement.

Analysis of Case Study 15.

This subject has leadership skills, communication strengths.

organisational and management ability and personal enthusiasm and drive. Her work and organisational membership are community based, and centred mainly around senior citizen activities. While these activities are beneficial to the community, they are the basis of a personal retirement lifestyle that is stimulating and enjoyable. It is interesting to note that in her view these community activities and participation are not considered to be a component of her leisure time.

CHAPTER 6

SUMMARY AND CONCLUSION

Restatement of the Problem

Statement of the issues being investigated.

The purpose of this study is to investigate the role of retired school principals in their community, the influence they exert and the reason they choose to pursue this particular role. This study also investigates the leadership capabilities and vision brought to the community by these retired principals, and the benefits gained by the community because of their active participation.

More specifically, the aims of the study are:

- * To investigate the type and range of activities of retired principals.
- * To understand why retired principals work. [paid or voluntary].
- * To investigate the roles of retired principals in the community.
- * to investigate the education [formal and informal] undertaken by retired principals to meet their current needs.
- * To investigate the organisations retired principals support, and discover the influence these organisations exert on the community.
- * To examine the community's response to and need for, retired principals' participation in the community.

This study arose for several reasons. The writer has a strong personal interest in the "departure of principals". There is much written about the role of the school principal and principalship, but at this stage, a search through available literature shows minimal work on the departure of school principals. It is accepted that principals take powerful roles

in schools. Their leadership, management and communication skills are valued and useful. Their commitment to their workplace is exceptionally high. Almost inevitably, therefore, the question is asked - *What is the principals' role in retirement?* Are these people prepared to use their leadership, management and communication potential for the community's benefit? The contention held is that there are vast numbers of experienced and committed retired principals participating in local community life.

Research questions

Three questions require consideration when framing the plan for this thesis. The questions form a platform enabling the construction of the interview instrument, the collection of the data, the analysis of the gathered information and the declaration of the outcomes or findings.

The Research Question makes vital inquiries about *What role is played by retired school principals in the community?* The two Subsidiary Questions search for more information about former principals' roles by asking *What retained leadership skills do retired principals use in community activities and participation?* and *How does the community benefit from retired principals' active participation and involvement in community activities?* The response to these questions is the basis on which this thesis is developed and outcomes interpreted.

Summary description of procedures

Qualifications to be a case study interviewee.

The research study is conducted through the case study approach. To qualify as an interviewee, it is necessary for the respondents to have been a principal in a school, and/or to have lived in the Metropolitan East Education Region in Sydney, NSW.

Methodology used in Data Collection.

Data collection is a combination of methodologies, with the emphasis being placed on the qualitative approach. Collection of data follows naturalistic research methods. Analysis and interpretation are concurrent with the collection process. The construction of the questions included in the questionnaire is based on the "TAP" paradigm for constructing questions. [Foddy,1993:pp193]. The question design is based on the "Quinamensional Plan for Question Design" [Oppenheim, 1966:pp40]. Each respondent was interviewed personally, using the prepared questionnaire. This data is recorded as a case study, prior to analysis and conclusions being drawn. Certain assumptions are held and have been accommodated within the study. One belief held is that research is centred around a question that demands an answer, and from this, a problem is identified and a specific objective stated. Another is that research is systematic. There needs to be a structured format that is logical and leads to generalisations, principles, theories and hypotheses. Research is an interactive process, where gathered data needs to be inter-linked to find a solution to the problem.

Limitations to the study.

Certain limitations must be acknowledged in this study. This is a qualitative study. Fifteen developed case studies are the major source of data. Geographical boundaries were established. Only retired principals, whose geographical location for residency and/or work was the Metropolitan East Education Region in N.S.W. are investigated. The specific source of interviewees come from former membership of the Metropolitan East Primary and Secondary Principals Councils. There are no non-active former principals identified. Consequently, only active former principals are

interviewed as respondents in the case studies undertaken. Only leadership skills that are transferable to community activities are considered. The extent and range of community influence include self education, political action, economic equity and social activities and pressure.

Implications for theory and for practice.

Because actual "on-topic" material is scarce, the literature review for this study has embraced a search for selected readings that are wider in depth and scope than the topic would seem to require. Issues arising from readings on retirement, on the community and on the aged, have in part determined the direction and the action taken in this study.

Concept of the Study.

The concept of retired principals accepting responsibility for creating and taking opportunities to create a new role for themselves in post-retirement life is the lynch pin of the research study. How they develop a lifestyle that exhibits interest, involvement and leadership in the community is the story told in this research project.

The Effect of Retirement on the Subjects.

The respondents indicate that, since retirement, they have found it necessary to find a different direction for their lives. They admit that in their working role, they were *school centred and education based*. They need to pursue an undertaking that gives them with a purpose, personal satisfaction and fulfilment. The way they sought this undertaking provides the answer to the questions posed.

The use of their time is of crucial importance to them. People, who have spent a lifetime in being responsive to bells and timetables, appear to need a structured lifestyle in retirement. Personal interests and drives

are the major focus and direction of their activities. There is a feeling of "If I don't want to do it, then I won't do it", and "If I do want to do it, then that is what I will do." In other words, these people have a sense of freedom to choose their activities and interests, rather than a commitment to filling their job role description. Despite this feeling of liberation, there was virtually no planning or preparation for retirement, with the exception of organising and planning their financial situation so that financial security was assured. All subjects felt varying degrees of loss. Most frequently mentioned was the *loss of status*. By being the principal, they felt important, responsible and needed. On retirement, and with the role of principal shed, they felt that their self esteem, confidence in themselves and their standing in the community was reduced. They felt strongly about the loss of structure in their lives. School life was highly organised and structured. Bells ruled the day. The timetable and ritual of the day became an established habit. [Most still need a morning tea break promptly at 11 o'clock - the morning recess bell time]. The loss of daily contact and communication with people [teachers, parents and children] and the shared life within a close-knit community of school create a real need. The greatest loss of all was the daily excitement or expectation that school provides. School was an exciting and exhilarating place to go to; the daily challenges needing to be faced, the unknown always present and the personal interaction, brought a degree of personal satisfaction and the necessity to be innovative and a decision maker. Stress is recognised as an on-going factor of school life for principals. However, the general perception is that stress was part of school life and as such, becomes just another facet of school life that needs to be coped with.

Analysis and findings related to the Research Question.

What role is played by retired principals in the community?

Following the review and analysis of the transcripts of interviews, a similar or common pattern emerges. All former principals interviewed participate in community affairs at a leadership level, usually by taking executive positions on committees or by representing community bodies. The interviewees were asked about their interests, participation in work, leisure activities, self education, organisation membership and community involvement. The range and variety of interests pursued is extensive. However, each individual is relatively single minded, having only one or two "interests", but it should be noted that the demarcation between interests, work, leisure, self education and community involvement is difficult to draw, as these are used in combination to complement and strengthen the particular focal area of interest.

Community leadership roles are taken by former principals in organisations such as Rotary, Probus, local service clubs [e.g. RSL], church organisations concerned with the pastoral care of the elderly, youth and the needy, social/ craft groups, Scouts, community theatre, sporting bodies, genealogical and historical groups, environmental groups and community radio.

The subjects are concerned with social action issues, people and the environment. By responding to these concerns, former principals have developed a lifestyle that is active, gives service and is community based. These people are filling vital and important leadership roles within the community, while simultaneously satisfying their own personal need for enjoyment, recognition in the community and fulfilment. Even

though all use individual leadership skills to enhance and lead community activities, they do not think of themselves as community leaders. A personal perspective of their involvement in community based activities is one of providing a service because they have the time and the ability to do so.

Williams [1998] writes that Ruth Cracknell says, "Nearly everything about ageing is good..... It's like having gone on a journey, with knowldge and self-knowledge growing all the time..... I think the great thing about growing old is keeping a very open mind to everything. No preconceived ideas. No stereotyped views about what the world is like.....That's the big secret. If your opinions have hardened, then you have stopped growing. It's a kind of atrophy". This same attitude seems to emerge from the analysis of transcripts of interview made from most of the retired principals. There is a sense of living for each day and the excitement that comes with participating in community activities.

Analysis and findings related to subsidiary question 1.

What retained leadership skills do retired school principals use in community activities and participation?

The studies reveal a wide and varied list of leadership skills and accomplishments. They are all "people's people". They care for and understand people. They are skilled oral and written communicators. They have the ability to form lasting personal networks and manage teams and groups of people with ease. All comment that working with volunteers and adults, is different from the school situation; a greater awareness of individual needs is required, and a different approach is necessary. They

have a capacity to organise personnel and resources as well as scheduling and formulating rosters. Sharing management concerns, making decisions and controlling finances and budgets are within their area of expertise and capabilities.

Analysis of findings related to subsidiary question 2.

How does the community benefit from the participation and involvement of retired school principals?

The community benefits in many ways because of the interest, involvement and active participation of former school principals. The fact that they have the time to give, as well as interest and enthusiasm is an important factor. They are prepared to share with the community their experience, expertise, knowledge and wisdom. The subjects of these case studies are totally involved in, and dedicated to community issues or concerns. They bring to community organisations leadership, and an extensive network of colleagues and friends who are able to influence community issues and bring both social and political pressure to community need and change.

Retired principals within the community framework are able to widen the perspective of the community to aspects about retirees and their needs and the needs of the groups they are working to assist. As volunteer workers, freely giving their time and expertise, these subjects and other former principals like them, give to the community a willing workforce whilst saving the community financially

Major Findings

The respondents in this study are recognised former leaders within the education system, each having held executive positions for about 70 percent of their education careers. Whilst acknowledging that they have

leadership skills, they do not consider they are unique, having small personal regard for their power, influence and abilities. Their universal response is, "We can just do these things -they are nothing special - we are basically teachers." Most noticeable is their individual drive and personal enthusiasm. They are self motivated. They are prepared to use their own time selflessly in pursuing their personal interests which happen to be community based and centred.

Most of those interviewed acknowledge the difficulty of adjusting to retirement. Concerns are expressed about their financial situation when moving from a regular fortnightly salary to being a self-funded retiree. They feel a loss of status on leaving the principalship and entering retirement, and a vacuum in their life on leaving the school situation. The school life they knew, was highly structured and their involvement in school activities and affairs was total. It is essential that they find a new direction for their drive and enthusiasms as they search for personal enjoyment, contentment and fulfilment in their retirement.

AA Advantages [1998] expresses the view that "great teachers have the knack of communicating their vision to their students". The statement is appropriate. By transposing retired principals for "great teachers" and community for "students", the notion is true for this study. In clarifying ways to implement this concept, the same article stresses the need to be "convincing", to have a personal belief in the message, to link the message to things that are relevant, to be able to "see the end result and the most effective way of getting there", to "focus on key messages" and "encourage everyone to work together". The subjects of this study are exemplars. The vision held by each respondent has been the central pivot of his/her community activities, facilitating personal drive, giving

direction for leadership and making goals achievable.

Personal enjoyment, contentment and fulfilment in retirement come through active involvement and participation in the community. By being able to transfer the leadership skills used within the school system to community activities and organisations, former principals find a role that accommodates their personal needs while giving to the community their time, their enthusiasm, their direction, their service and their leadership.

Suggestions for further research.

The research question, "What role is played by retired principals in the community", is a catalyst for further studies involving leadership and retirement. At this stage, possibly four further research programs could be conducted.

One interesting aspect to pursue is the comparison of roles and participation levels in the community by former school executives and by executives from industry and business. With both groups being leaders within their own workforce, their transition into retirement, their attitude to and their involvement in community activities could lead to some insights about leadership style and skill.

A further study that continues with the theme of retirement and leadership could be the comparison of roles and participation in the community between retired school executives and retired school teachers. The question arises that if the teachers are not participating in leadership roles within the school while in the work force, are they prepared to accept leadership roles in the community on retirement?

Following on from the previous research suggestions, is an idea that encompasses not only retirement and leadership, but inquires into the differences in attitudes, financial awareness, understanding of community needs, community participation and adaptation to social and personal restraints. The assumption accepted for this study is that executive retirees are self-funded and that non-executive retirees receive government social security pensions. The question being raised is what is the role of these two groups in the community and what is their level of community awareness and participation.

To extend this thesis, and inquire into the research and subsidiary questions in greater detail, a wider sampling of respondents should be made. A survey, could be conducted of *all* retired principals in the Metropolitan West Education Region of NSW. Collection of data, analysis and correlation of findings may confirm the findings of this thesis or open the field for a different understanding of the research question. Are there for example, significant number of principals, who on retirement, "retreated" completely from community activities of the type mentioned herein??

Findings to the study - a Statement.

Feteridge [1996] states that principals with few outside interests, fail to plan for the extended time that retirement brings. Consequently they are at a loss at retirement. He continues with the theme that principals need an effective retirement plan that identifies ways to replace the goals set by work.

The findings of this thesis, endorse the title of Feteridge's [1996] article, "Making Retirement an Adventure". The subjects of the case studies

have certainly done that. Their activities and commitment enhance their lives in such a way that their retirement is an adventure for them. However, the findings of this thesis in general disagree with those of Feteridge; the fifteen retired principals in this study do have outside interests, do plan for extended leisure and do not feel at a loss in retirement.

This study suggests that retired school principals play an important, influential and participatory role in the community. They do this for several reasons. Former principals enter retirement expecting their personal horizons to expand and their knowledge and self-knowledge to grow. They exhibit a commitment to learning, whether formal or informal. They show a concern and a caring attitude towards others. Many have strong Christian convictions which need fulfilment.

In the search for personal satisfaction and a redirection or a new focus to their lives they create a lifestyle that meets their present needs. They find a solution to these needs by participating in community activities and organisations. By using skills transferred from their school leadership experience, they are able to give service, expertise, personal interaction, time and leadership when participating in the community. Their ability to communicate easily with others, form friendships and accept leadership roles willingly, gives them access to community activities that fulfil community needs. Through this effort, retired school principals are able to assist the community in many beneficial ways.

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On Community:

Australian Parliament House-of-Representatives-Standing-Committee-on-Community-Affairs 1990 Submissions and correspondence are presented from organisations government departments, academics and interested individuals in response to the inquiry into the community involvement of retired persons.

[1] "Is Retirement Working"

[The terms of reference of the Inquiry of which its report was the result were to examine the effectiveness of current arrangements to assist retired persons and those planning for retirement to: a) maintain an active role in community affairs b) have access to advice and options which maintain an active and positive use of leisure time and c) provide maximum opportunity to participate in continuing voluntary and/or paid work. Individuals and organisations provided submissions. The report includes: Greying Australia?; role of government & inter-government relations; information, advice & counselling; transport & mobility; volunteer effort; older people & special needs.]

[2] "Is Retirement Working?" [Workshop papers]

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[3] Kendig, H. "Greying Australia? Implications for Community Involvement of Older People."

[Some of the social perceptions and facts that have given rise to concern for the social involvement of older people are examined. 'New' assumptions about older people and their 'problems' and potential are considered. Older people of today and tomorrow are examined.]

[4] McCullum, J. "Is Retirement Working? Workshop papers

[This paper looks at the persistent barriers to community involvement of the elderly. Two questions are pursued. First - what social changes have occurred which shift the late life balance between work and leisure and secondly - is there a question of the patterns of community involvement in old age and the barriers to health promotion and promotion of an active society.]

[5] Elsworth, J "The role of the media: myths and misconceptions of Aging."

[This paper is based on observation made on older participants at the Hawthorn Education Centre. It argues that there is a growing awareness amongst older people of the positive aspects of older life. Theories reject stereotypes which undervalue and degrade them. The media must accept the role and responsibility to portray an accurate and balanced view of all groups in society.]

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[The author argues that the whole idea of retirement is too structured- another model should be evolving. Work and lifestyle changes should be progressive as people near retirement ages, resulting in a natural and gradual leaving of the workforce]

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[The article reports on Leadership Enhancement for the Active Retired which trains retirees for leadership roles by helping them to gain motivation, confidence and awareness of needs. Active retirees learn to focus their energy, time, skills and interests on community leadership.]

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[This article reports on interviews with older adults participating in Leadership Enhancement for the Active Retired. Findings showed that 1] a greater percentage of women were engaged in community leadership; 2] pre-retirement leadership roles did not predict post-retirement leadership and 3] leadership training must be relevant, experiential and practical.]

On Aged:

Allen, A.Z. *"Rethinking Adult Agency Programs: Writing for Older Women."* [1991].

[A senior citizen agency in New York State explored the program develop needs of older women. Research revealed that women aged 85+did not want to participate in any organised program; women aged 75-84 were conservative spenders, would only pay for programs of top quality and needed to leave with something tangible;women aged 65-74 were too active and too busy to participate in program development in a leadership role, but would attend; women 55-64 were already involved in many programs, were interested in participating. The conclusion was that organisations developing programs for the elderly, should be careful not to group them into one category of those over age 55, but do a periodic assessment to create programs that will serve the varied clientele.]

Beatty, P. & Wolf, M.A. *"Connecting with Older Adults: Educational Responses and Approaches. Professional Practices in Adult Education and Human Resource Development Series."* [1996] Krieger Publishing Co. Melbourne.

[This book addresses issues of ageing, expectations for the aged person and means to respond in practical and educationally sound ways to the changing needs of the older person.]

Carver V & Liddiard, P.[edited at Open University] *"An Ageing Population"*, [1978] Hodder and Stoughton in association with The Open University. Great Britain.

[This is a source book. Its articles by numerous writers cover a wide spectrum of concerns and issues arising from an aging society. These are: Aging populations in our society and social and environmental concerns; myths and experience on growing old; living in the community; needs and problems arising among the aged; disabilities and sickness in later life; the professional and the working together of professional services in the community.]

Clennell, S. 1990. *"Older Students in Europe. A Survey of Older Students in Four European Countries."* Open University, Milton Keynes [England] European Older University Research Group; Open University, Walton, Bletchley, Bucks [England. British Open University, Regional Academic Services.

[A survey taken from people over age 60 in four European countries revealed that were participating in to keep the mind active, to develop and interest and to achieve personal development and satisfaction. The respondents were highly motivated, well organised and capable of adapting to the course demands. Future . policy issues for education were identified: a new profile on ageing, active participation, access to adult education for older students, teaching and learning methods, intergenerational issues and changing concepts on retirement.]

Glass, J.C.Jrn. 1989. *"Preferences of Older Adults and Implications for Local Congregations"*. *Journal Of Religion and Ageing*, 1989, 5, 3, p43-58. This article refutes the stereotypical view that intellectual abilities decline in old age. Researchers have discovered that most older adults are active, intelligent and involved. Expressive vs instrumental orientated preferences among older adults in a church setting were studied. It is concluded that age, sex marital status and physical health do not seem to affect the older person's ability to learn.

Young, Michael D *"Life After Work: the arrival of the ageless society."* [Michael Young & Tom Schuller - with Johnson Birchell & Gwyneth Vernon] [1991] London. Harper Collins.

[This book looks at the ageing society we live in, and the effect the "aged" have on the everyday living of all.]

- iii] What skills/expertise do you use in this work"
- iv] In what way do these skills/expertise help you with the work?
- v] In what way does the work benefit the community?
- vi] What do you gain through working with the community?

Part 5. Present Leisure activities.

- i] What leisure activities have you taken into retirement?
- ii] What new leisure activities have you participated in since retirement?
- iii] Why do you participate in these leisure activities?
- iv] What level of participation do you take?
 - As a participant?
 - As a leader/organiser/ initiator?
- v] In what way do your leisure activities impact on the community?
- vi] In what way do you benefit from your involvement in the community?

Part 6. Organisational Membership.

- i] What organisations have you maintained and continued membership status since retirement?
- ii] What new organisations have you joined since retirement?
- iii] What level of participation do you take?
 - As a participant?
 - As a leader/organiser/initiator?
- iv] How does your membership help the community?
- v] In what way are you assisted by the organisation?

Part 7. Present Community involvement.

- i] What pre-retirement community activity/involvement have you actively continued since retirement?
- ii] Apart from previously mentioned community involvement, is there any new/different participation since retirement?
- iii] How do you think the community benefits from your involvement?

Part 8. Concluding statements.

- i] Is there anything you want to tell me about your leadership within the community?
- ii] Can you see a change from your pre-retirement and retirement roles?
- iii] Is your retirement lifestyle how you envisaged it?
 - IN what way is it different?

Thank you for giving your time and participating in this interview.

APPENDICES

APPENDIX 1. QUESTIONNAIRE

This questionnaire was prepared and responses gained during an interview.

Part 1: Defining the purpose of the questionnaire.

The purpose of this questionnaire is to assist me in gathering information about:

1. The role taken in the community by retired school principals.
2. The retained leadership skills used by retired school principals within the community.
3. The way the community benefits from the active participation and involvement of retired school principals.

Perspective.

When responding to this questionnaire, you need to consider the leadership skills you practised within the school context, and endeavour to see if these skills were transferred by you to the activities you are now involved with in the community.

[Before starting to asking you a series of questions, I need you to provide me with some personal details.]

Part 2: Personal Details.

- i] Your name.
- ii] Position held in education prior to retirement.
- iii] Number of years in a school executive position/positions.
- iv] Educational attainments/qualifications [at time of retirement].
- v] General interests//community involvement [at time of retirement].
- vi] Retirement year.
- vii] Years presently retired.

Part 3: Present Main Interests.

- i] What pre-retirement interests have you continued since retirement?
- ii] What new interests have you developed since retirement?
- iii] What is your level of participation in these interests?
- iv] Do you have any special knowledge or expertise in the interest areas?
- v] Have you taken an "action" course in the interests?
If so..... explain further. -
Who/what has the "action" been directed?
Who/what has the "action" affected?

Part 4. Present Work.

- i] Have you done any work since retirement?
- ii] What is this work?
Is it paid work?
Is it voluntary work?
Can you tell me the reasons for this work?