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# Purposeful Retirement Book Club

## Facilitation Guide

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## Introduction and Welcome

Thank you for your interest in hosting a Purposeful Retirement Book Club. These materials are the result of collaboration between North Dakota State University Extension and South Dakota State University Extension. This booklet is designed to help you host a Purposeful Retirement Book Club. Materials included in this facilitation guide include checklists, book club ground rules, discussion questions, and other relevant materials. These materials are meant to be used with adults thinking about retirement. It is our hope to continue to improve the content of these materials. If you have questions or comments, please contact Leacey E Brown, South Dakota State University Extension Gerontology Field Specialist at either [leacey.brown@sdstate.edu](mailto:leacey.brown@sdstate.edu) or (605) 394-1722.

### Book Club Description

This book club is for adults that are near retirement or thinking about retirement. It will invite attendees to think about retirement in new and exciting ways. Instead of viewing retirement as a withdrawal from the workforce, it will encourage attendees to envision a new adventure full of purpose and meaning.

### Book Club Objectives

1. Explore attitudes and beliefs about retirement.
2. Describe how purpose influences health and wellness outcomes.
3. Integrate purpose into retirement planning.
4. Identify goals and priorities for retirement.

### Book

Purposeful Retirement: How to Bring Purpose Happiness and Meaning to Your Retirement by Hyrum W. Smith (ISBN: 978-63353-503-9)

### Optional Workbook

Purposeful Retirement: Workbook and Planner by Hyrum W. Smith (ISBN: 978-1-63353-812-2)

**Time requirement:** Six 60-minute Sessions

**Target audience:** adults age 40 and older

**Number of participants:** 10 to 12





## How to Run a Purposeful Retirement Book Club

Retirement planning is an important topic. Much of the existing educational content about retirement focuses on the financial aspect of retirement planning. This book club is unique because it emphasizes the importance of planning to live with purpose during retirement years. This facilitation guide includes a variety of materials to be used by anyone who wants to host a retirement book club. Tools provided in this booklet include:

- Overview and checklist
- In-person planning checklist
- Virtual planning checklist
- Ground rules
- Book club schedule
- Discussion questions
- Event evaluation

### Overview and Checklist

The purpose of the book club is to facilitate small group discussions about purpose and retirement. This model allows participants to share and learn from each other. The questions included in this guide help to encourage participants to think more deeply about the content presented in the book and how it relates to their particular situation. Everything needed to host the book club is included in this facilitation guide. The book club can be hosted in-person or virtually. The content that follows will provide expanded information for hosting either a virtual or in-person book club.

### Overview of What to Expect

- Prior to facilitating the book club, read the book and review the Purposeful Retirement Book Club Facilitation Guide.
- Develop the meeting schedule for the book club (six sessions). Allow two weeks between each session.
- If hosting an in-person session, reserve a room with enough space to seat 10 to 12 participants.
- Promote the book club so people know it is happening.
- If you are hosting the book club virtually, provide an optional 30 minute technology help session prior to session 1 of the book club.

## **In-Person Session**

- A meeting room large enough to host a group of 10 to 12 participants.
- Enough copies of ground rules and book club schedule for each participant.
- Provide refreshments such as coffee and water.
- A copy of the Purposeful Retirement Book Club Facilitation Guide.
- Enough copies of the evaluation for each participant.

## **Virtual Session**

- Meeting software (Zoom, Google Hangouts, Microsoft Teams, etc.).
- A copy of the Purposeful Retirement Book Club Facilitation Guide.
- Electronic copies of the ground rules and book club schedule.
- Electronic copy of evaluation.

## **Book Club Ground Rules**

1. All meetings will start on time and last no longer than 1-hour.
2. Read assigned sections of the book prior to the meeting.
3. Listen actively and attentively. Ask for clarification if you are confused.
4. Comment on ideas, not people. It is okay to disagree as long as it is done respectfully.
5. Avoid put-downs (even humorous ones).
6. Build on one another's comments; work toward shared understanding.
7. Do not monopolize discussion.
8. Speak from your own experience, without generalizing.
9. Consider anything that is said during the book club session strictly confidential.
10. Avoid interrupting others.
11. Allow everyone the chance to contribute to the discussion.
12. Keep on topic, but feel free to introduce information that is relevant to the discussion.

## **Book Club Schedule and Session Agenda**

### **Session 1**

- Welcome and introduction. Encourage each participant to introduce themselves and tell the group why they were interested in the Purposeful Retirement Book Club.
- Review ground rules with participants and ask if there are any rules they would like to add.
- Use questions provided in this booklet to facilitate a discussion among participants.
- Encourage participants to share their questions.
- Chapters covered during session

- Introduction: A state of being “von Bismarcked”
- Chapter 1: Two Camps
- Thank participants for their time and remind them of the next session date and which chapters will be covered.

## **Session 2**

- Welcome participants.
- Use questions provided in this booklet to facilitate a discussion among participants.
- Encourage participants to share their questions.
- Chapters covered during session
  - Chapter 2: Turning in the Title
  - Chapter 3: Discovered Values, Directed Time
- Thank participants for their time and remind them of the next session date and which chapters will be covered.

## **Session 3**

- Welcome participants.
- Use questions provided in this booklet to facilitate a discussion among participants.
- Encourage participants to share their questions.
- Chapters covered during session
  - Chapter 4: Purposeful Planning
  - Chapter 5: Mentoring and Being Mentored
- Thank participants for their time and remind them of the next session date and which chapters will be covered.

## **Session 4**

- Welcome participants.
- Use questions provided in this booklet to facilitate a discussion among participants.
- Encourage participants to share their questions.
- Chapters covered during session
  - Chapter 6: Make a Difference
  - Chapter 7: Retiring Together
- Thank participants for their time and remind them of the next session date and which chapters will be covered.

## **Session 5**

- Welcome participants.
- Use questions provided in this booklet to facilitate a discussion among participants.
- Encourage participants to share their questions.
- Chapters covered during session
  - Chapter 8: Reaching Out
  - Chapter 9: Take Care of Yourself
- Thank participants for their time and remind them of the next session date and which chapters will be covered.

## Session 6

- Welcome participants.
- Use questions provided in this booklet to facilitate a discussion among participants.
- Encourage participants to share their questions.
- Chapters covered during session
  - Chapter 10: Make Decisions
  - Chapter 11: Purposeful Happiness
  - Afterword
- Thank participants for their time and remind them to complete the evaluation.





## Discussion Questions

### Session 1

#### Ice Breaker and Opening

1. How close are you to retirement?
2. What interested you about this book club?

#### Introduction: A State of Being “von Bismarcked”

1. How has retirement changed over the past century:
  - What did retirement look like for your grandparents and parents?
  - How do you think retirement will look for your children, grandchildren or other young people in your life?

#### Chapter 1: Two Camps

1. The author talks about there being two camps regarding employees' perception of retirement. What camp are you in?
  - How does your camp continue to shape your views of retirement?
2. The author describes retirement as a gift. Who can you share this gift with today?
  - How can you take this gift of time and do more to purposefully redirect your retirement?
3. Author urges readers to think of retirement as “my time” and asks them to think about how they can make a difference with the time they are given. Redirect retirement to the things that are meaningful and valuable to the individual person. How do you want to use your time?

### Session 2

#### Chapter 2: Turning In the Title

1. The author describes the danger of retirement when we are defined by our job and our title.
  - Describe how you define yourself.
  - How can you show appreciation for yourself for just being you?
2. How can we prepare or adjust to the big changes that come with retirement?
  - What strategies or perspectives can we employ?
3. What principles regarding retirement are on your Belief Window?
  - How do these principles control the way you perceive retirement?



4. How do you differentiate a busy and productive day?

### **Chapter 3: Discovered Values, Directed Times**

1. Hyrum states that everyone has a set of governing values. These values identify the highest priorities in our lives and they govern how we choose to live our lives. How do you identify your governing values?
  - What would you cross the I-beam for?
  - Whom would you cross the I-beam for?
2. Does how you spend your time reflect your governing values?
  - Are you giving the most time to that which matters most?
  - What can you do tomorrow to ensure your time aligns with your priorities?
3. Hyrum challenges the reader to build a retirement that reflects their values. What strategies have you used to identify, clarify, and prioritize your values? Love, Loyalty, health, education, self-direction, universalism, benevolence, security, Power, achievement, hedonism, stimulation, self-direction, etc.

### **Session 3**

#### **Chapter 4: Purposeful Planning**

1. The author states that time management is really about the sequence of events we choose to put in our day. If something matters to us, or it is something we value, we find time for it. Are you giving your time to what you value? (Remember from last session, the I-beam analogy – what or whom would you cross the I-beam for?)
  - What do you value?
  - What sequence of events are you choosing to put in your day?
2. The author shares a story of Winston Churchill's later years where he is obsessed with whether he had made a difference in the world. Describe what "making a difference" means to you. Do you feel like you have made a difference?
  - What prevents people from making a difference? (Examples: too old, feel you have already done enough)
  - What can you do tomorrow to help you say "yes" to this question?

#### **Chapter 5: Mentoring and Being Mentored**

1. This chapter begins with the idea of finding someone you would like to emulate in retirement, someone who can mentor you. Do you have someone you admire, someone 10-15 years older than you, to ask about their retirement? What would you want to know?
  - How is it going?
  - What do you like about your retirement?
  - What do you recommend doing?
  - What do you wish you had done differently (or not done) right from the start?
2. One pages 85 and 86, the author describes a friend's experience, Bob Ulin, with retirement and one of his mentors. The mentor's advice was "You cannot be so inflexible that what you do in your career is your only passion. Because when that's gone, you'll just die. You have to be more

resilient than that. You have to be willing to adapt in order to stay happy in retirement. What does being “resilient” and willing to “adapt” look like for you in retirement? Describe.

3. What does your “perfect, purposeful retirement” look like? (page 88). What would be the pictures or images of a collage of your perfect, purposeful retirement?
  - What does it look like?
  - What images are you choosing?
  - Who is in it?
  - What are you doing?
4. What can you do today to start living (or planning) a “perfect” or ideal retirement?
5. Is there anything else that attracted your attention that you would like to discuss?

## **Session 4**

### **Chapter 6: Make A Difference**

1. In the introduction to Chapter 6, the author describes the basic three emotions that motivate human actions and behaviors. These emotions are fear, duty, and love.
  - Describe a time when you were motivated by fear, duty or love.
  - Describe the similarities/differences.
2. In this chapter the author talks about doing what you love. He highlights several options for doing what you love in retirement, such as unretire, volunteer, develop talents, learn, leave a legacy, and explore. As you read this chapter, what options stuck out to you?
  - Which is the most appealing?
  - Which is the least appealing?
3. What options discussed in this chapter are you going to act on?
  - If money and time were no object, what would you really like to do?
  - What is on your dream retirement bucket list, such as activities, goals, possessions? Now prioritize the most important items on the list.
4. How do you turn these retirement dreams into an actionable plan?
  - What can you do today to act on an option?

### **Chapter 7: Retiring Together**

1. The author states that “retirement is an emotional time.” Your identity is gone, the predictable schedule is gone, and the structure of your time is gone. It is important to have an ‘emotional playbook’ to help in your retirement.
  - Emotional Playbook can include the following
    - i. Dividing chores
    - ii. Continuing to work
    - iii. Traveling together
    - iv. Pursuing activities
    - v. Having fun together
    - vi. Living arrangements

- Did any of the topics the author recommend couples include in their emotional playbook surprise you? Explain.
2. Do you see any topics that the author did not include in the emotional playbook?
  3. What topic in your emotional playbook would you pick to begin discussing with your partner today?

## Session 5

### Chapter 8: Reaching Out

1. The author talks about the importance of social connection in our lives. Studies have shown that loneliness is prevalent among many older adults. Loneliness has nothing to do with the number of people around you – it has to do with whether or not we feel connected to someone.
  - Describe a time when you felt heard and understood by the people around you.
2. Loneliness is believed to speed up dementia, lead to fatal heart disease, and eventually contribute to early death. What can you do to assure that loneliness will not become part of your retirement?
  - Ideas:
    - i. Make friends – As your activities change, you will meet new people with similar interests. Friendships can form around your service, your hobbies and your interests. Making friends is a natural byproduct of service
    - ii. Go Clubbing – such as book clubs or any interest you have. Do things so your work doesn't get smaller.
    - iii. Communicate – Share your story – your legacy
    - iv. Babysit – (or spend time with young people) because it lowers risk of developing Alzheimer's disease and other cognitive disorders.
3. What can you do to reach out to other retirees who might suffer from loneliness?
4. Are there new communication tools you need to learn to improve your communication skills (i.e., Facebook, Instagram, texting, Zoom)?

### Chapter 9: Take Care of Yourself

1. Good health is a gift. Some retirees are restricted in their activities because of health. We may not have complete control over our health but we do have complete control over our outlook. So, how can we keep a positive attitude?
  - What can we do when others want to focus on their bad health?
    - i. Change the topic.
2. What are you already doing to take care of yourself?
  - Describe what you currently do to keep your body moving.
  - Describe your relationship with food. How does it make it difficult or easy to maintain a healthy weight?
  - Describe what helps or hinders your efforts to keep your body in optimal health for your current health status.
  - What would you like to try?
  - What can you do tomorrow to improve how you take care of yourself? Be specific.



3. “Do not let people assign you to a stage.” What does the author mean by this statement and why is it important?

## Session 6

### Chapter 10: Make Decisions

1. The author talks about how important it is to maintain control as we age. One way to do this is to make decisions (medical power of attorney, financial power of attorney, end-of-life preferences, will, trust, and long-term care). What decisions have you already made to maintain control of your retirement?
2. What decisions do you still need to make?
  - When will you make the decisions?
  - How can you start the process?
  - What barriers are standing in your way?
  - Who needs to be part of this discussion?

### Chapter 11: Purposeful Happiness

1. In this chapter, the author states that now is the perfect time to take stock of where you have been, what you have done, and what you want to do in the future. Now is the time to choose happiness. One question to consider is “What do I want to let go of and what do I want to give myself to?” While you’re moving forward in your own retirement, what do you want to give yourself to? What makes you happy?
  - Once you identify what makes you happy, implement it.
  - What do you do if you don’t know what makes you happy?
  - The key is to act and to choose to find joy.
2. What does the author mean by the term “freedom zone?”
  - It is the state where we enjoy the greatest balance of freedom, health, free time and emotional well-being. There is no reason not to be happy. But you have to work to find joy. EMPHASIS: Joy requires proactivity. It doesn’t just happen.
3. How will you “describe” a happy, purposeful day in your retirement? Be specific, if possible.
  - Will you set goals?
  - Will you have daily/weekly/monthly “to-do” lists?
  - How will you measure “success” outside of the workplace?
  - Will it entail exploring, contributing, learning, etc.,
4. What are you willing/planning to do to experience a happy, purposeful retirement?
5. What have been the most important take-aways from this book?



## Evaluation

Thank you for participating in the Purposeful Retirement Online Book Club. Our goal is to ensure we are providing high quality and useful contents to participants. You can help us achieve our goal by completing the evaluation.

Overall, how would you rate this book club?

- Poor
- Fair
- Good
- Very Good
- Excellent

How would you rate the effectiveness of the facilitators of this book club?

- Poor
- Fair
- Good
- Very Good
- Excellent

**Please rate your level of agreement with the following statements:**

The discussion questions were relevant and stimulated conversation to explore ideas, solve problems, or make comments.

- Strongly disagree
- Disagree
- Somewhat disagree
- Somewhat agree
- Agree
- Strongly agree

This book club encouraged me to explore my personal attitudes and beliefs about retirement.

- Strongly disagree
- Disagree
- Somewhat disagree
- Somewhat agree
- Agree
- Strongly agree

This book club helped me realize how purpose influences health and wellness outcomes.

- Strongly disagree
- Disagree
- Somewhat disagree
- Somewhat agree
- Agree
- Strongly agree

Because of this book club, I plan to integrate purpose into my retirement planning.

- Strongly disagree
- Disagree
- Somewhat disagree
- Somewhat agree
- Agree
- Strongly agree

Because of this book club, I have identified new goals or priorities for retirement.

- Strongly disagree
- Disagree
- Somewhat disagree
- Somewhat agree
- Agree
- Strongly agree

The information in the book was written at a level I could understand.

- Strongly disagree
- Disagree
- Somewhat disagree
- Somewhat agree
- Agree
- Strongly agree



I could relate to the stories told by the author of the book.

- Strongly disagree
- Disagree
- Somewhat disagree
- Somewhat agree
- Agree
- Strongly agree

Describe how you plan to integrate purpose into retirement planning:

Other comments you would like to make about the online book club:

Gender

- Male
- Female
- Other (please describe): \_\_\_\_\_

Race/ethnicity (select all that apply)

- American Indian/Alaska Native
- Asian
- Black or African American
- Hispanic
- Latino
- Native Hawaiian/Other Pacific Islander
- Some Other Race
- White

Age

- 18-29
- 30-39
- 40-49
- 50-59
- 60-69
- 70-79
- 80-89
- 90 or older