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Portrait of Hal: A Narrative Case Study that Illuminates the Transformative Influence of Generativity and Life Stories on the Legacy of an Adult Educator/Learner

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ABSTRACT

This qualitative narrative case study uses the social science portraiture approach to explore how the learning experiences of a retired manufacturing manager have influenced his identity and his choice of an encore career in education. Hal B. is a retired manufacturing manager in his 70s who is now an instructor of leadership, management, and process improvement for working adults in a mid-south regional university.

The portraiture approach to Hal's experience of a second career as an educator exemplifies the ways in which generativity, a person's need to care for and prepare future generations (Erikson, 1980), and storytelling are factors that help shape personal identity and lead to transformative learning. Hal's life story exemplifies the way in which adult learners reinvent themselves through reflection and transformative learning experiences.

Findings of the study include significant tension between education and experience, the importance of experiencing the generative action of others, the ways in which generativity influences learning, the function of storytelling as a means of reflection and transformative learning, and the benefits of encore careers for institutions of higher education.

This dissertation is approved for recommendation
to the Graduate Council.

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DEDICATION

This work is dedicated to the memory of my mother Kathryn Pauline Plummer. She should have had this opportunity but instead dedicated herself to making sure that I had the opportunities. Her love and care made me the person that I am today.

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Chapter One

INTRODUCTION

When Hal B. was in high school in the 1950s he was a self-described juvenile delinquent. A short, skinny boy, Hal greased back his hair, wore black "stomper" boots, and emulated movie actor James Dean. While Hal was never in serious trouble, he frequently skipped school, choosing to spend his days in the downtown pool halls and malt shops of his small city. Hal's life changed when his high school principal intervened. The principal, Mr. Worthington, picked up Hal at the bus stop almost every day, drove him to school and encouraged him to join the high school's mixed chorus. Through the intervention of this mentor, Hal changed the direction of his life.

After a long career in manufacturing management, Hal, now in his 70s, intervenes in the lives of his own students as an instructor of leadership, management, and process improvement for working adults. Through his teaching, Hal is preparing a new generation of leaders. He is also fulfilling a promise he made to Mr. Worthington to make a difference in the lives of others just as Worthington made a difference in his own life.

Hal B. has led an extraordinary life. His life experiences include stints as an army drill instructor, hourly laborer, lean manufacturing consultant, manufacturing plant manager, professional square dance caller, singer, professional crappie fisherman, and now instructor and consultant in a business outreach program at a mid-south regional university. His life story is marked by three factors: his ability to transform himself through learning, his ability to shape his own identity through storytelling, and his strong sense of generativity—his need to care for and prepare future generations.

Through the use of social science portraiture, this study tells the story of Hal's encore career as an instructor and explores the life experiences that have shaped his identity. This study is also a personal story. Hal is my colleague and friend. This portrait also illuminates the reflective journey that Hal and I shared in recording his stories and experiences. Ultimately we were each transformed by the experience.

This qualitative study falls within the social constructivist paradigm or worldview. Also called interpretivism, the social constructivist paradigm assumes that reality is subjective and multiple. Individuals socially construct the meaning of their experiences. Research in this tradition relies on multiple points of view and attention to the context of lived experiences (Creswell, 2007; Creswell, 2009; Merriam, 2009; Patton, 2002).

Problem Statement and Purpose of the Study

Adult learners come to learning opportunities with a lifetime of previous experience. Transformative learning theory (Mezirow, 1990, 1991, 2000, 2009) deals with how adults make meaning of their experiences. Mezirow and Associates (2000) described transformative learning as a process in which an adult reassesses previously held assumptions to see the world in a different way:

> Transformative learning refers to the process by which we transform our taken-for-granted frames of reference (meaning perspectives, habits of mind, mind-sets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action. Transformative learning involves participation in constructive discourse to use the experience of others to assess reasons justifying these assumptions, and making an action decision based on the resulting insight. (pp. 7-8)

Hal has reinvented himself, transformed himself through learning multiple times throughout his life. Ultimately Hal has transformed from a country boy who "walked behind a mule with a plow" to a successful manufacturing leader. In his most recent transformation, Hal

has engaged in an encore career as an instructor of adult students.   Marc Freedman (2006, 2007)

identified the encore career as a work-life trend in which workers move into work with a social

purpose instead of a traditional retirement. As Freedman (2006) wrote:

> Instead of phasing out or fading away, they are focusing on work that matters most to
> them and to the larger society. They are looking for more from work, not less: more
> flexibility, yes, but also more meaning, and just as important, more impact. (pp. 45-46)

The purpose of this narrative case study was to discover how the transformative learning

experiences of a retired manufacturing manager have contributed to his encore career teaching

workforce development at a regional university in the mid-south.

Research Question and Questions Guiding the Study

The research question of the study was: How have the learning experiences of a retired

manufacturing manager shaped his identity and influenced his encore career in education?

Questions that guided the study were:

1. What biographical factors influenced Hal's decision to become an educator?

2. What generative factors influenced Hal's decision to become an educator?

3. How does Hal's telling of his life story make meaning of his life and work
    experiences?

4. How has Hal's life story narrative influenced his encore career in education?

5. What meaning does Hal ascribe to his experience of an encore career?

6. How has Hal's life story narrative affected others?

Theoretical Framework

This narrative case study is structured by the intersection of four theoretical constructs:

the encore career, generativity, the life-story model of identity, and transformational learning.

Marc Freedman (2006, 2007) identified a work-life trend of the "encore career" in which

workers move into work with a social purpose instead of a traditional retirement. Freedman (2007) described the encore career as unlikely to last as long as a first career; the encore career, however, is a significant period of ten to twenty years.   Common fields for encore careers include education, healthcare, clergy, or social work.

In Erikson's (1980) model of adult development, generativity is the hallmark of the seventh stage of development in which the adult seeks to make a positive contribution to future generations through parenting, mentoring, or leadership. Erikson characterized the middle years as a conflict between generativity and stagnation.

McAdams (1988, 1996, 2006a) incorporated the concept of generativity into his life story model of identity. McAdams maintained that the life story was the vehicle through which modern persons create their personal identities and make meaning of their life experiences. According to McAdams (1996) the life story of an adult may be understood in terms of narrative tone, imagery, theme, ideological setting, nuclear episodes, imagoes or alter egos, and the generativity script.

Mezirow (1990, 1991, 2000, 2009) put forth a theory of transformative learning in which the adult uses reflection to make meaning of experience. Mezirow (1991) wrote: "Reflective learning involves assessment or reassessment of assumptions. Reflective learning becomes transformative whenever assumptions or premises are found to be distorting, inauthentic, or otherwise invalid" (p.6). In other words, transformative learning is the process of reflecting on assumptions and transforming them into a more useful or accurate assumption to guide future action.

Significance of the Study

Hal's story is significant as an example of how adults experience transformative learning throughout the lifespan. His story is also significant as an example of the power of generativity in adult learning. Finally Hal's case is significant as an example of successful and productive aging.

How can a single case illustrate larger concepts? McAdams and West (1997) identified three purposes for the single case study: exemplification, discovery, and comparison. Exemplification is using a single case as an example of a theory or a general life course. A second use of the single case is to discover potential new theory through induction. By exploring a single case, the researcher can identify potential hypotheses for future research. Finally the third use of the single case is comparison. For instance, researchers may use the single case to compare to a particular theory. A single case may also be used to compare theories to each other by applying them to the same case. Finally cross-case comparison is possible.

The case of Hal B. may be used to exemplify transformative learning, the life story model of identity, and the encore career. Hal's case may also be used for discovery, particularly in putting together the way transformative learning and the life story model of identity fit together to form a single learning process.

Delimitations

The delimitations of the study were:

1. The study focused on one retired manufacturing manager's experience of an encore career in a regional university setting. The study did not focus on the impact of

encore careers outside of education or in settings other than a public institution of higher learning.

2. The participant was an unusual individual with a broad range of life experiences which have led him to an encore career. The participant was not a typical case but an extraordinary case; his experience was not necessarily representative of a typical life experience.

Definitions of Key Terms

The primary terms used in the study are defined as follows:

- *Encore Career.* An encore career is a second career of 10-20 years duration devoted to a social purpose such as education, the clergy, social work, or healthcare (Freedman, 2007).

- *Generativity.* Generativity is an adult's concern for and commitment to the well-being of future generations (Erikson, 1980; McAdams, 2006).

- *Generativity Script.* The generativity script is the part of the adult life story that shows "how the adult generates, creates, nurtures, or develops a positive legacy of the self, to be offered to subsequent generations" (McAdams, 1996, p.309).

- *Ideological Setting.* The ideological setting is made up of the religious, political, and ethical beliefs and values that inform an adult life story (McAdams, 1996).

- *Imagery.* Imagery is the figurative language used in an adult life story; examples include word pictures, metaphors, similes, and symbols (McAdams, 1996).

- *Imagoes.* Imagoes are the idealized versions of the self or alter egos that appear in an adult's telling of the life story (McAdams, 1996).

- *Narrative Case Study.* Narrative case study is a blend of narrative inquiry and the traditional case study. The result is a narrative study bounded by a particular set of circumstances or experiences.

- *Narrative Identity.* A narrative identity is the evolving story that individuals tell to make sense of their lives (McAdams, 2006).

- *Narrative Tone.* Narrative tone is the emotional tone or attitude of an adult life story (McAdams, 1996).

- *Nuclear Episodes.* Nuclear episodes are scenes that stand out in an adult's telling of his or her life story; nuclear episodes include high points, low points, and turning points (McAdams, 1996).

- *Social Science Portraiture*. Social science portraiture is an approach to qualitative inquiry in which art and science are blended to capture the complexity and subtlety of human experience. "Portraitists seek to record and interpret the perspectives and experience of the people they are studying, documenting their voices and their visions—their authority, knowledge, and wisdom" (Lawrence-Lightfoot & Davis, 1997, p. xv).

- *Theme.* Themes are the goal-directed sequences that appear in an adult life story (McAdams, 1996).

- *Transformative Learning*. Transformative learning is learning that results in new or transformed meaning schemes through reflection on life experience (Mezirow, 1991).

Chapter Summary

This study focused on the life experiences of Hal B., a retired manufacturing manager who is engaged in an encore career in education. The purpose of this narrative case study was to discover how the learning experiences of a retired manufacturing manager may have contributed

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to his encore teaching career teaching workforce development at a regional university in the mid-south. The primary research question was: How have the learning experiences of a retired manufacturing manager shaped his identity and influenced his encore career in education? This qualitative study used social science portraiture to illuminate the ways in which a single adult learner and educator continually transformed his life through both generativity and transformative learning.

<div align="center">**Chapter Two**</div>

<div align="center">**REVIEW OF THE LITERATURE**</div>

Hal's experience of an encore career is best described in context. This chapter focuses on the relevant literature on the social purpose encore career, generativity and adult development, the life story model of identity, and transformative learning. The chapter concludes with an in-depth discussion of how these four theoretical approaches fit together to create the theoretical framework guiding the study.

The Social Purpose Encore Career

The first theoretical approach that informs Hal's experience is that of the encore career. This section examines the demographic trends leading to the aging or "greying" of the United States work force, the concept of the Third Age of life, a discussion of findings from the Harvard study of adult development, and the concept of the encore career.

A "greying" work force.

As the baby boomer generation enters its 60s and as aging workers remain in the work force, the U. S. work force is getting older. A 2009 survey by the Pew Research Center of 1,815 U. S. residents indicated that people aged 55 and older made up 18.7% of the U. S. labor force; this percentage was the highest since the Bureau of Labor Statistics began collecting data in 1948. Projections indicated that 92.8% of the growth in the U. S. labor force from 2006-2016 will occur in workers age 55 and older; the participation rate of workers 55 and older will increase to 22% by 2016 (Taylor, et al., 2009). Chosewood (2010) indicated that, based on U. S. census data, the number of mid-career workers is declining. Workers age 35-44 declined by 9% in the years from 2000-2010, while workers ages 45-54 increased by 18%, workers 55-64 increased by 48%, and workers 65 and older increased by 15%. Projections for 2010-2020

indicated even more extreme numbers: workers 35-44 were anticipated to decline by 10%, workers 45-54 to increase by 3%, workers 55-64 to increase by 73%, and workers 65 and older to increase by 54%. Bluestone and Melnik (2010) maintained that despite current high unemployment rates, that by 2020 there will be a shortage of workers. Baby boomers:

> … are not expected to retire at anywhere near the same rate as earlier cohorts of older workers. In fact, large increases in labor force participation are expected to occur among those aged 55 and older, with 55- to 64-year-olds increasing their participation rate from 64.5 to 68.1 percent between 2008 and 2018. Those aged 65 to 74 are expected to increase theirs from 25.1 to 30.5 percent. And those 75 and older are projected to increase their participation rate from 7.3 to 10.3 percent. (p.4)

Older workers will stay in the work force for a variety of reasons. According to Taylor et al. (2009) in a Pew Research Center survey, 17% of workers 65+ said they worked because they needed money, 54% worked because they wanted to work, and 31% worked both because they needed money and they wanted to work. Workers age 65+ provided the following reasons for continuing to work: to feel useful or productive, to live independently, to have something to do, to be with other people, to support self or family, to help improve society, to qualify for a pension or Social Security, and to receive health benefits.

The American concept of retirement is changing due to a number of factors. Taylor et al. (2009) maintained that 63% of people between 50 and 61 indicated that they are considering delaying retirement because of the recession. Of people 62 and older, 38% said that they have already delayed retirement. Despite financial hardship, the same study indicated that older workers were the most satisfied in their jobs. Of those surveyed who were age 65 or older, 54% said they were "completely satisfied" with their jobs in contrast to 29% of workers ages 16 to 64. The authors attributed this satisfaction to the fact that workers are working because they *want to* work rather than from financial need.

In the past decade the American workforce has become older. If projections are accurate, older workers will make up more of the workforce in the decade to come. Recent survey data has indicated that many older workers have remained in the workforce at least partly because they wish to do so; work is a source of satisfaction for many older workers.

The Third Age.

Peter Laslett's (1991) seminal work on aging, *A Fresh Map of Life: The Emergence of the Third Age*, maintained that classifying all older adults as geriatric was misleading. He proposed instead a four-part life course. "First comes an era of dependence, socialization, immaturity and education; second an era of independence, maturity and responsibility, of earning and of saving; third an era of personal fulfillment; and fourth an era of final dependence, decrepitude and death" (p. 4). Laslett used the term *Third Age* to describe the older population that remained active and engaged in old age.

Laslett (1991) argued that the Third Age is not necessarily a chronological or biological age. He suggested that the Third Age is the time of the most personal productivity and fulfillment; for some, the Third Age exists simultaneously with the Second Age. For others, retirement at the end of the Second Age is a necessary precursor for entering the Third Age. In other words, Laslett maintained that for most people, retirement is needed to provide leisure for self-fulfillment. This period of self-fulfillment he called "the crown of life" (p. iv). Freedman (2007) wrote of Laslett, "At the heart of his thinking is the simple insight that individuals at this juncture have, for a protracted period and in large numbers, both experience and time" (p. 105).

The Third Age then is a term describing that period of life between the end of work or the end of a first career and true old age. The energy, experience, and wisdom of this group lend themselves to work with a social purpose.

Harvard study of adult development.

The Harvard Study of Adult Development was one of the longest longitudinal studies of aging ever undertaken. Vaillant (2002) reported the results of the study in *Aging Well: Surprising Guideposts to a Happier Life from the Landmark Harvard Study of Adult Development*. The study was conducted using three separate cohorts: a group of 248 men selected as Harvard sophomores, a group of 456 inner city men, and a sample of 90 gifted women. The Harvard study began in 1939; however, later in the process, Vaillant gained access to the inner city cohort from another 1939 Harvard study (the Glueck Study) about juvenile delinquents; this cohort was the control group from the original Glueck study. Vaillant acquired the subjects from the Glueck study in 1975. The women in the study were originally part of the 1922 Terman study of gifted children. The women were the oldest group in the cohort and had been studied for almost 80 years.

The Vaillant (2002) study had a number of findings including:

- The good experiences of childhood ultimately had more impact on successful aging than bad childhood experiences;

- Generativity was a key to successful aging;

- Seven factors contributed to healthy aging: not smoking or quitting early, adaptive coping style, absence of alcohol abuse, healthy weight, stable marriage, some exercise, and years of education;

- Retirement should be voluntary; if older persons are enjoying work they should continue; and,

- Successful retirement was marked by new social networks, play, creativity, and lifelong learning.

Throughout his book Vaillant (2002) included a number of case studies that focused on individual case histories of participants who had aged successfully as well as those participants who did not adapt well to the aging process. In cases of successful aging the participant either continued to work or engaged in activities that allowed him or her to create new connections and to continue learning. The most successful participants in the Harvard study may be viewed as examples of the Third Age as described by Laslett (1991).

Encore careers.

Freedman (2006, 2007) built on the work of Laslett and Vaillant in his conception of the encore career. Freedman described the encore career as a second career of 10-15 years duration undertaken for a social purpose such as education, social work, health care, or the clergy. Instead of working to retire, Freedman wrote:

> The encore career pioneers are heading toward a different shore. They have asked the same question, "Why work?" but they have come to a different conclusion. Instead of the freedom from work, they are searching for the freedom to work; instead of saving for a "secure retirement," they are underwriting an encore career. (Freedman, 2007, p. 12)

Goggin (2009) provided an alternate definition of the encore career: "a new form of work that brings together the practicalities of making ends meet with the spirit of service for people in their post-midlife years" (p. 95) .

The financial need.

Bank (2009) linked the economic downturn of 2007 to the concept of encore careers. He maintained that the increasing financial instability and the loss of almost $3 trillion in "retirement assets since September 2007 has turned what was once hotly debated into conventional wisdom: Most Americans, of all income brackets, will work longer, not only longer than their own earlier expectations, but longer than recent generations have worked" (p. 69). Bank maintained that the economic crisis has sped up the emergence of the encore career as an

alternative to traditional leisure retirement. He wrote, "longer working lives are the most practical way to restore a semblance of personal financial security, and perhaps save the federal treasury as well" (p. 70). Freedman (2007) stated the case more bluntly: "We know the costs related to Social Security, Medicare, and other entitlement programs, and we know that most baby boomers have not saved nearly enough to face the future with financial security" (p. 43).

Moen (2005) posited the idea that the "career mystique" of working for one company followed by a leisure retirement is a myth. Writing from a feminist perspective, Moen maintained that this model was not possible for all workers even in the 1950s, that this model depended on a full-time homemaker at home, that global competition has made this model unworkable, and that:

> … very few men or women *can* live by the old rules. One job per family—the old breadwinner/homemaker model—is often a ticket to economic privation, since wages have not kept pace with inflation or living costs, the minimum wage is a poverty wage, and "middle-class" in today's consumption economy means something different than it used to, as does "retirement," given the longevity revolution and Social Security, Medicare, and pension worries. (p. 193)

The social pull.

Bank (2009) described financial concerns as the push toward the encore career; he described social purpose as the "pull" (p. 70). Freedman (2007) maintained that baby boomer commitment to stay in the work force is motivated by the need to "find meaning in the workplace and use these years to improve the lives of their communities. The trend toward longer working lives is being driven as much by the desire to work as the need for additional income" (p. 44). Moen (2005) shared a similar vision:

> Few Americans approaching retirement age want to keep on "keeping on" in their existing jobs, facing long hours, high demands, and often few rewards. Many talk about public service, about fulfilling their desire to "make a difference," to "give back" to their communities. … For some this may be paid work, as a teacher, a firefighter, a public

servant. For others it may be volunteering for a religious community, a neighborhood school, or a particular cause. (p. 203)

Freedman (2006, 2007) used the example of Bill Gates as a successful individual, who in mid-life recreated himself through social purpose pursuits. Bill Gates stepped down as the head of Microsoft to work more intensely with the Bill and Melinda Gates foundation to fulfill his philanthropic mission.

Encore career as social panacea.

The encore career is potentially the solution to the talent shortage that the baby boomer retirement will bring as well as a solution to put the intellectual capital of the boomers to work on social problems. Freedman (2007) visualized the year 2030 as if the majority of boomers pursued social purpose careers:

> The boomers now function as the backbone of education, health care, nonprofits, the government, and other sectors essential to national well-being. This group is serving as the glue of society … And the windfall has not just been in numbers and experience. Second-stage social entrepreneurship and innovation is being spearheaded by individuals bringing the accumulated skills from the first half of working life to the higher goals of their second acts. (p. 4)

Bank (2009) pointed out that growth in public sector jobs such as healthcare, education, and government work is stronger than job growth in other sectors. Bank suggested that these areas are suitable for encore careers. Bluestone and Melnik (2010) identified 15 possible careers that would be appropriate for encore careers. These included: primary, secondary and special education teachers, registered nurses, home health aides, personal and home care aides, nursing aides, orderlies and attendants, medical assistants, licensed practical and licensed vocational nurses, business operations specialists, general and operations managers, child care workers, teacher assistants, receptionists and information clerks, medical and health service managers, clergy, and social and human service assistants (p. 5).

The trend toward encore careers has spurred the development of social and educational programs. Marc Freedman, the author of many articles and a book on encore careers, is the president of a non-profit think tank—Civic Ventures which focuses on "boomers, work, and social purpose" (Bluestone & Melnik, 2010, p. 31). Goggin (2009) identified several "Encore Communities" including Denver's Boomer's Leading Change, Grand Rapids, Michigan's !Encore, Portland, Oregon's Life by Design Northwest, and Phoenix, Arizona's Experience Matters. A number of educational programs offered through community colleges have also been developed to help older workers transition into encore careers (Freedman & Goggin, 2008; Goggin, 2009). Examples include the Virginia Community College System Career Switchers program that "provide[s] qualified people from other professions with an alternative route to a state teachers' license" (p. 34). The 16-week program targets those 50+ but is open to people of all ages who have a baccalaureate degree and five years of work experience. Other programs include Collin County Community College District outside Dallas; this accelerated teaching program for participants age 50+ provides mentoring support from working teachers. Central Piedmont Community College Success is another program that goes beyond teacher education to provide support for baby boomers that are transitioning to encore careers (Freedman & Goggin, 2008).

Generativity and Adult Development

Generativity is an adult's concern for and commitment to the well-being of future generations (Erikson, 1980; McAdams, 2006a). This section includes Erik Erikson's theory of human development, a modern conceptualization of generativity, a discussion of the role of generativity in successful aging, and a discussion of links between generativity and learning.

Erikson and adult development.

Erik Erikson conceived a theory of human psychosocial development that traced the human life cycle from infancy to old age. Erikson (1980, 1982) maintained that humans experience eight stages of development, each of which is characterized by "psychosocial crises":

1. Infancy: The infancy stage is characterized by the struggle between basic trust versus mistrust.

2. Early Childhood: The early childhood stage is characterized by the struggle between autonomy versus shame or doubt.

3. Play Age: The play age is characterized by the struggle between initiative and guilt.

4. School Age: The school age is characterized by the struggle between industry versus inferiority.

5. Adolescence: The adolescence stage is characterized by the struggle between identity versus identity confusion or diffusion.

6. Young Adulthood: The young adulthood stage is characterized by the struggle between intimacy versus isolation.

7. Adulthood: The adulthood stage is characterized by the struggle between generativity versus stagnation.

8. Old Age: The old age stage is characterized by the struggle between integrity versus despair.

Erikson (1982) discussed generativity:

To adulthood (our seventh stage) we have assigned the critical antithesis of *generativity* vs. *self-absorption and stagnation*. Generativity, we said, encompasses *procreativity, productivity,* and *creativity,* and thus the generation of new beings as well as of new

products and new ideas, including a kind of self-generation concerned with further identity development. (p. 67)

Although Erikson (1980, 1982) discussed generativity in terms of parenthood, he also made it clear that business and public life were also avenues through which persons could express generativity.

Generativity in the Harvard Study of Adult Development

Vaillant (2002) built on Erikson's theory in his work with the Harvard Study of Adult Development, the 1939 longitudinal study that followed three cohorts of participants throughout the life span. He added two stages of development—career consolidation and "Keeper of the Meaning". Career consolidation occurs between the intimacy and generativity stages. Vaillant described this stage: "Mastery of this task involves expanding one's personal identity to assume a social identity within the world of work" (p. 46). "Keeper of the Meaning" is a stage that occurs between generativity and integrity. Vaillant wrote, "The focus of a Keeper of the Meaning is on conservation and preservation of the collective products of mankind—the culture in which one lives and its institutions—rather than on just the development of its children" (p. 47).

Vaillant (2002) described generativity as a key to successful aging. In all three cohorts of the study, generativity was the most significant predictor of a long-lasting happy marriage. He maintained that those who were most successful in aging were generative in their family and work lives.

A theory of generativity.

McAdams and de St. Aubin (1992) developed a theory of generativity that could be assessed and measured. The authors disagreed with Erikson's placement of generativity as belonging to a particular life stage, although they agreed that generativity was a concern for adults not children. They maintained that generativity was "…a configuration of seven

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psychosocial features constellated around the personal (individual) and cultural (societal) goal of providing for the next generation" (p. 1004). The seven features were cultural demand, inner desire, concern for the next generation, belief in the goodness of humans, generative commitment, generative action, and narration of the generativity script.

Each of these features of generativity is discussed below:

1. *Cultural Demand* refers to the societal expectations that adults face to contribute to and take responsibility for the next generation.

2. *Inner Desire* refers to the need or drive to care for the next generation. This drive may be characterized by a need for a symbolic form of immortality or by a need to be needed by others.

3. *Concern* is a conscious concern for the next generation motivated by cultural demand and inner desire.

4. *Belief* is a belief in the goodness and worthiness of the human species.

5. *Commitment* is a commitment to generativity through the goals and the decisions of the individual. Commitment is a product of demand, desire, concern, and belief.

6. *Generative Action* is comprised of behaviors that involve creating, maintaining, or offering. Generative action goes beyond altruism; it is the act of leaving a legacy of the self.

7. *Narration* is the generativity script of an individual life. The adult's narration of his or her life story provides unity, meaning, and purpose to life—the narration provides the adult with a sense of identity. (McAdams & de St. Aubin, 1992, pp. 1005-1006; McAdams, de St. Aubin, & Logan, 1993, p. 222)

Studies supporting McAdams and de St. Aubin's generativity theory

Beyond a theoretical framework, McAdams and de St. Aubin (1992) developed and validated instruments to measure generativity. The authors developed the Loyola Generativity Scale, a 20-item self-report that measures generative concern. They also developed a behavior checklist used to assess generative action. The final measure was an assessment of themes in biographical episodes. A study conducted by McAdams, de St. Aubin, and Logan (1993) of 51 young, 53 midlife, and 48 older participants indicated that generative action was mildly correlated with overall life satisfaction. The authors hypothesized that generativity in young adults would be lower than in midlife and older adults; they also hypothesized that generativity would decline in the oldest subjects. The study indicated that while the hypotheses were in general found to be tenable, the young adults did demonstrate generativity and that the expected decline in generativity among older adults was not clearly supported by the data.

Peterson and Stewart (1996) conducted a longitudinal study of women who graduated from Radcliffe College in 1964. The study used the Thematic Apperception Test (TAT) as a measure of generativity motivation. The TAT asks participants to view pictures and then write brief stories about the pictures. The authors coded the stories for generativity themes. The authors found that for women on a career path, generativity motivation was correlated with work satisfaction; for women not on a career path, generativity motivation was correlated with parenting but not with work satisfaction. Generativity motivation was also linked to political involvement at mid-life and to the experience of having had a mentor in younger adulthood.

In their study of middle career male engineers, Clark and Arnold (2008) studied three features of generativity: concern, commitment, and action. These features are expressed in four varieties of generativity: productivity, family, interpersonal and societal care, and leadership.

These features are also expressed in both work and life contexts. The study focused on the relationship between generativity and work satisfaction and subjective career success. The study indicated that generativity was strongly correlated with generativity as measured on the Loyola Generativity Scale. Self-perceived career success was correlated with generativity on one measure but was not significant in interviews with participants.

The Life Story Model of Identity

McAdams (1988, 1993, 1996) formulated the life story model of identity to describe how adults' narratives of their lives form adult identity. McAdams describes how the "storied self" creates identity, the components of the life story model of identity, and how themes of agency and communion combine to create a uniquely American identity he terms the redemptive self.

The storied self.

McAdams (1996) presented a framework for studying persons. He found that personality traits measured by the Five Factor Model of personality--extraversion, neuroticism, conscientiousness, agreeableness, and openness to experience—are inadequate to explain the concept of self. He identified six qualities of the modern self. These qualities are:

1. The self is a "reflexive project" that a person works on. In other words, the "I" creates the "me" (p. 297).

2. Persons work on the self in an everyday social context.

3. Modern selves possess multiple layers and exhibit depth.

4. The self develops and changes over time.

5. The self needs coherence over time; the person must construct some coherence and continuity.

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6. The self finds fulfillment in the "pure relationship" (p. 298); in other words, the self is understood in the context of relationships.

McAdams's model began as a method of inquiry and evolved into a model of personality couched in the language of story. McAdams proposed a multi-level approach to the study of personality which addresses personality traits at level one and personal concerns such as striving, life tasks, and defense and coping mechanisms at level two. Level three consists of psychosocial dimensions of identity—the overall purpose and unity of human lives.

McAdams (1996) wrote:

Modern adults bestow on the Me unity and purpose—that is, they provide the Me with an identity—by constructing more or less coherent, followable, and verifying stories that integrate the person into society in a productive and generative way and provide the person with a purposeful self-history that explains how the me of yesterday became the me of today and will become the me of tomorrow. (p. 305)

In a later take on his theory McAdams (2008) identified six principles about life stories. First the self is "storied"—identity is built through the stories persons tell about their lives. Next, stories serve to integrate lives in both synchronic and diachronic patterns. Synchronic patterns bring together the diverse aspects of personality into a cohesive whole of the individual personality; diachronic patterns show how this cohesive person changes through time. Third, stories are told in social relationships. In other words stories are actually *told* to others; there is a relationship between the listener and the teller of the story. Fourth, stories change over time. Although a story is about true events, the details and telling of the story subtly morph with each telling. Fifth, stories are cultural texts that reflect the overall environment and culture of the society in which they are set. Finally, some stories are better than others; personality researchers can evaluate stories in terms of good and bad both on their story elements and on the aspects of psychological health that they reveal about the teller.

The components of the life story.

Identity is formed when the "I arranges elements of Me into a temporal sequence complete with setting, scenes, character, plots, and themes" (McAdams, 1996, p. 307). The life story narrative is comprised of eight components: narrative tone, imagery, theme, ideological setting, nuclear episodes, imagoes, and generativity script (McAdams, 1988, 1993, 1996). These components are described below:

1. *Narrative tone* is the overall emotional tone or attitude of the life story. The Western literary traditions of romance, comedy, tragedy, and irony are examples of how a life story may take a narrative tone.

2. *Imagery* refers to the word pictures, metaphors, similes, other literary devices that provide a narrative with a distinct tone.

3. *Themes* are "goal-directed sequences" (McAdams, 1996, p. 308) that the characters in the narrative pursue. The primary themes are those of power and those of intimacy (McAdams, 1996; McAdams, Hoffman, Mansfield, & Day, 1996).

4. *Ideological setting* refers to the beliefs and values that situate the life story in particular ethical context.

5. *Nuclear episodes* are the memorable biographical scenes in the person's life including high points, low points, and turning points.

6. *Imagoes* are the characters or alter egos that the person takes on in the course of the narrative.

7. *Generativity script* is the way in which the person creates a positive legacy for themselves through nurturing and developing the next generation. (McAdams, 1988, 1996, 2001, 2008)

In McAdams's (1988) life story model of identity the primary components of (1) ideological setting, (2) imagoes, (3) nuclear episodes, and (4) generativity script are expressed through thematic lines of either intimacy or power motives. For example, a story may contain nuclear episodes of love, dialogue or sympathy (intimacy) or of strength, influence, action, or status (power). The same four components reveal the person's stage of ego development through the life story's narrative complexity: simple narratives are associated with lower levels of ego development and complex stories with higher levels of ego development (Loevinger, 1976; McAdams, 1988).

The narrative themes of agency and communion were identified in three studies by McAdams et al. (1996). The studies indicated that autobiographical stories could be reliably coded for themes of agency and communion. Agency themes included self-mastery, status, achievement/responsibility, and empowerment; themes of communion included love/friendship, care/help, dialogue, and community. The results indicated that adults chose to express their motivations in terms of either agency or communion when telling their life stories.

The redemptive self.

McAdams's more recent work has focused on the life stories of highly generative adults. He identified a specific type of life story told by generative adults that he characterized as a story of commitment (McAdams, Diamond, de St. Aubin, & Mansfield, 1997; McAdams, Reynolds, Lewis, Patten, & Bowman, 2001). The prototypical commitment story involves the following components: (a) the protagonist enjoys an early advantage while (b) others are less fortunate. The protagonist is guided by (c) a personal ideology that does not change over time. The protagonist (d) endures many negative episodes and setbacks which are eventually redeemed through good outcomes, and (e) the protagonist dedicates his or her life to benefiting society.

Life stories that follow this pattern are associated with adults who score high on measures of generativity (McAdams et al., 1997).

McAdams et al. (2001) studied redemption and contamination sequences in the oral and written autobiographies of undergraduate students and midlife adults. Midlife adults who scored high on measures of generativity had significantly more sequences of redemption (bad events turning good) than contamination (good events turning bad) in their life stories. In both student and midlife samples, sequences of redemption were associated with higher self-report scores of psychological well-being; sequences of contamination were associated with low levels of well-being.

Bauer, McAdams, and Sakaeda (2005) studied how adults' memories of episodes of personal growth as told in their life stories indicated maturity and happiness. Growth episodes that were focused on learning (integrative episodes) were associated with high levels of maturity while growth episodes that focused on humanistic concerns (intrinsic episodes) were associated with high levels of happiness. Older adults were most likely to share growth memories that were both indicative of maturity and happiness.

McAdams (2006a, 2006b) has recently identified the *redemptive self* as a particular identity that appears in the life stories of midlife Americans who score high on measures of generativity. Similar to the commitment story, this narrative sequence is marked by six components: early advantage or blessing, early awareness of the suffering of others, moral depth and steadfastness, sequences of redemption, conflicts in motivation between power and intimacy, and finally the prospect for future growth even in old age. McAdams identified this particular sequence as a particularly American story that serves as a reflection of American culture and values.

Transformative Learning

Adult learners come to learning opportunities with a lifetime of previous experience. Transformative learning theory deals with how adults make meaning of their experiences. Mezirow (Mezirow and Associates, 1990) conducted a 1975 nationwide study of women re-entering community colleges. The primary finding of the study was *perspective transformation*. By learning to become critical of their role in society, the women changed the assumptions or frames of reference through which they saw the world.

Mezirow and Associates (2000) described transformative learning as a process in which an adult reassesses previously held assumptions to see the world in a different way. They wrote:

> Transformative learning refers to the process by which we transform our taken-for-granted frames of reference (meaning perspectives, habits of mind, mind-sets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action. Transformative learning involves participation in constructive discourse to use the experience of others to assess reasons justifying these assumptions, and making an action decision based on the resulting insight. (pp. 7-8)

Meaning perspectives.

Central to the concept of transformative learning is the idea of a frame of reference or meaning perspective. According to Mezirow and Associates (2000), meaning perspective has two dimensions: habit of mind and resulting points of view. Habits of mind includes broad worldviews or orientations; examples include liberal versus conservative thought, fear of change versus propensity to change, introversion versus extroversion, and capitalism versus Marxism. Resulting points of view are more specific meaning schemes that "tacitly direct and shape a specific interpretation and determine how we judge, typify objects, and attribute causality. Meaning schemes commonly operate outside of awareness" (p. 18).

Mezirow and Associates (1990) differentiated between meaning schemes and meaning perspectives. Meaning schemes are specific interpretive guides that are habitual. As the authors stated, "When we open the front door, we expect to see our front lawn, not a tidal wave or a charging rhino" (p. 2). Meaning perspectives, on the other hand, are higher order theories or beliefs. These meaning perspectives are the assumptions that guide how new experiences are assimilated and interpreted.

Learning.

Mezirow (1991) described learning "as the process of using a prior interpretation to construe a new or a revised interpretation of the meaning of one's experience in order to guide future action" (p. 12). Based on the work of Habermas (1971), Mezirow (1991) identified two types of learning: instrumental and communicative. Instrumental learning is the process of learning how to do something—how to manipulate the environment. Communicative learning is about understanding what others communicate to us. Taylor (2000) wrote:

> It involves the most significant learning in adulthood, that of communicative learning, which entails the identification of problematic ideas, beliefs, values, and feelings; critically assessing their underlying assumptions; testing their justification through rational discourse; and striving for decisions through consensus building. (p. 3)

Transformation.

Transformative learning occurs when the learner transforms a problematic frame of reference. Mezirow (1991) wrote:

> Reflective learning involves assessment or reassessment of assumptions. Reflective learning becomes transformative whenever assumptions or premises are found to be distorting, inauthentic, or otherwise invalid. Transformative learning results in new or transformed meaning schemes or, when reflection focuses on premises, transformed meaning perspectives. (p. 6)

In other words, transformative learning is the process of reflecting on assumptions and transforming them into a more useful or accurate assumption to guide future action. These

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transformations may be sudden and dramatic, or the change may be more incremental, occurring gradually over time.

Mezirow and Associates (2000, 2009) identified ten phases or steps in the transformative learning process: (1) a disorienting dilemma, (2) self-examination, (3) critical reflection on assumptions, (4) connection of personal discontent to the process of transformation, (5) exploration of potential new role, relationships, or action, (6) a plan of action, (7) acquisition of new knowledge and skills, (8) experimentation with new roles, (9) building competence in new roles, and (10) reintegration of new perspectives into regular life.

In reviewing empirical studies of transformative learning Taylor (2009) identified six core elements of fostering transformation in students. These included individual experience, critical reflection, dialogue, holistic orientation, context, and authentic practice (p. 4). Methods in use for fostering transformation include arts-based, theatrical approaches (Butterwick & Lawrence, 2009), leadership development (Donaldson, 2009), mentoring (Mandell & Herman, 2009), and storytelling (Tyler, 2009).

The Theoretical Framework

This narrative case study is framed by three theoretical approaches—generativity, the life story model of identity, and transformative learning—that may be combined to provide a framework for studying the encore career experience of Hal B. (See Figure 1). Generativity as conceptualized by Erikson (1980, 1982) and operationalized by McAdams and de St. Aubin (1992) influences the life experiences of the adult learner. Life experience in turn influences generativity. Generativity also influences the life story narrative (McAdams, 1988, 1993, 1996) and reflection on life experiences. Storytelling is a form of reflection on experience which leads

both to the formation of a narrative identity as well as to the reassessment of assumptions. The result is transformative learning.

In this narrative case study, Hal's generativity is the engine that drives Hal's choices and actions. His generativity influences his life experiences which in turn lead to reflection and learning. The reflection and learning become part of Hal's life story narrative which both influences his identity and influences his choice of, and his ability to, pursue his encore career.
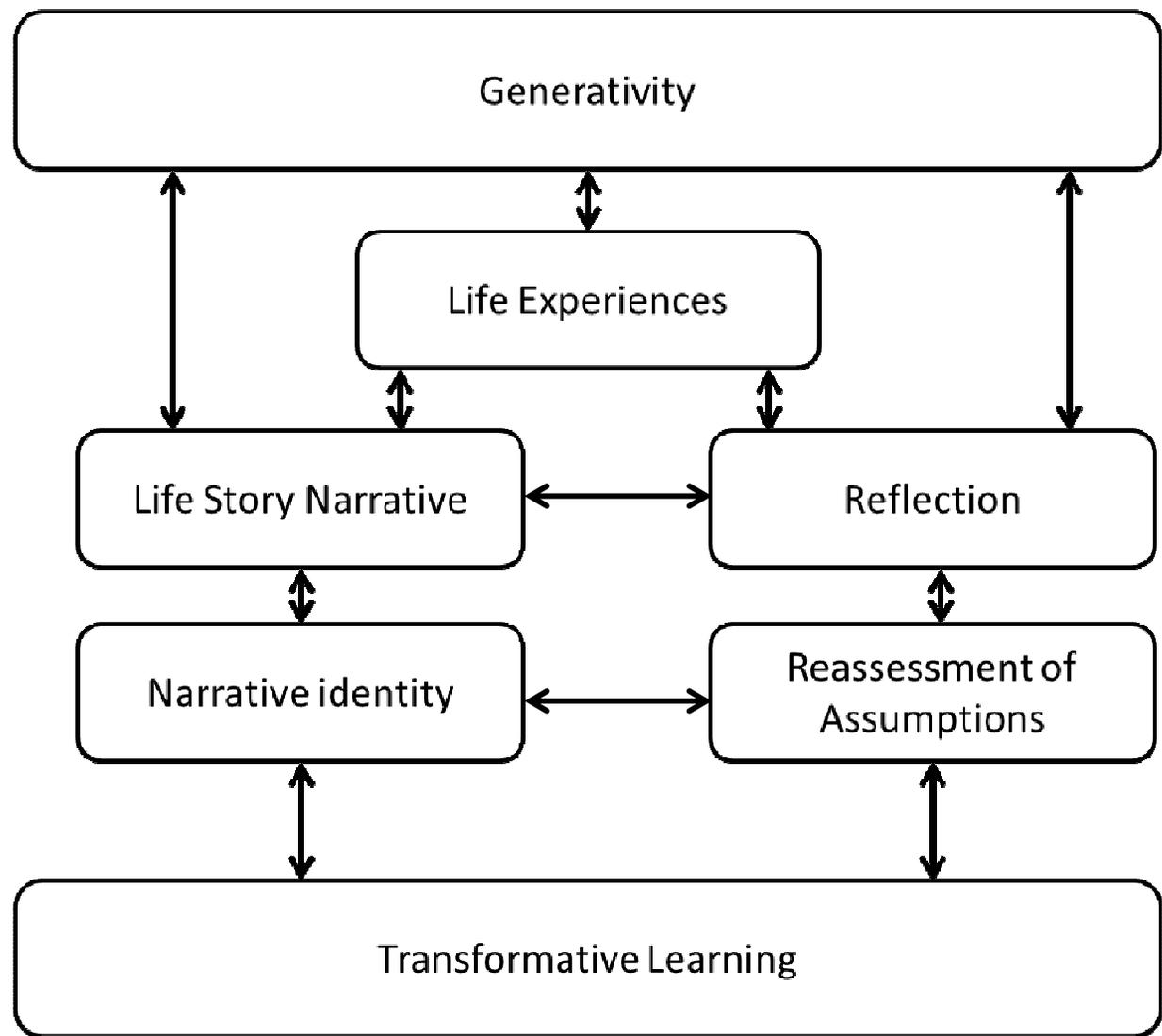
FIGURE 1 HOW GENERATIVITY INFLUENCES IDENTITY AND TRANSFORMATIVE LEARNING

Chapter Three

METHODOLOGY

The purpose of this narrative case study is to discover how the life experiences of a retired manufacturing manager may have contributed to his encore career teaching workforce development at a regional university in the mid-south. The grand tour research question is: How have the learning experiences of a retired manufacturing manager shaped his identity and influenced his encore career in education? Questions that guided the study are: (a) What biographical factors influenced Hal's decision to become an educator? (b) What generative factors influenced Hal's decision to become an educator? (c) How does Hal's telling of his life story make meaning of his life and work experiences? (d) How has Hal's life story narrative influenced his encore career in education? (e) What meaning does Hal ascribe to his experience of an encore career? (f) How has Hal's life story narrative affected others?

This chapter discusses the research methodology of the study including the following topics: rationale for the qualitative approach, the research design, description of the study variables, selection of subjects, instrumentation, data collection procedures, data management and analysis, limitations of the study, role of the researcher, and issues of trustworthiness.

Research Design

This research project is a narrative case study. I have blended two approaches—case study and narrative—to best capture the unique attributes of the informant. Hal B. is a storyteller. His ability as a storyteller has been instrumental to his style as an instructor, to his learning process, and to his approach as a manager; the narrative tradition is a natural fit. I have used a specific approach to narrative called *social science portraiture* in the analysis and writing of the study. When I considered the significance of the study, however, I realized that Hal's story is most meaningful in the context of his encore career. Therefore, I have bounded the study

of Hal's life by his experience of an encore career in education. The resulting study is a bounded narrative in which the stories each relate in some way to Hal's career as an educator.

Rationale for qualitative research design.

Qualitative research falls within the social constructivist paradigm or worldview. Also called interpretivism, the social constructivist paradigm assumes that reality is subjective and multiple. Individuals socially construct the meaning of their experiences. Research in this tradition relies on multiple points of view and attention to the context of lived experiences (Creswell, 2007; Creswell, 2009; Merriam, 2009; Patton, 2002).

According to Patton (2002), "qualitative inquiry can be used to discover, capture, present, and preserve the stories of organizations, programs, communities, and families" (p. 196). In this study, a qualitative approach to research is used to "discover, capture, present, and preserve" the stories of a single participant—retired manufacturing manager Hal B.

Creswell (2009) defined qualitative research as:

> … a means for exploring and understanding the meaning individuals or groups ascribe to a social or human problem. The process of research involves emerging questions and procedures, data typically collected in the participant's setting, data analysis inductively building from particulars to general themes, and the researcher making interpretations of the meaning of the data. The final written report has a flexible structure. Those who engage in this form of inquiry support a way of looking at research that honors an inductive style, a focus on individual meaning, and the importance of rendering the complexity of a situation. (p. 4)

Qualitative research focuses on the meanings that participants ascribe to their experiences. The research takes place in a natural setting rather than the artificial environment of the laboratory. The researcher is the primary or key instrument of the research. The research uses multiple sources of data and a flexible design that emerges as the study goes forward. The result is an interpretive, holistic representation of the data (Creswell, 2009; Creswell, 2007; Denzin & Lincoln, 2011; Merriam, 2009; Patton, 2002).

The case of Hal B. naturally lends itself to the qualitative approach. In selecting Hal I was not interested in looking at the prevalence of the encore career, nor was I interested in predicting the persons most likely to engage in a second career. Instead I was most interested in learning how Hal's broad range of life experiences has influenced his identity and his choice of beginning and continuing an encore career as adult educator. I was interested in learning about the meaning Hal makes of his experiences as a learner and an educator. As Merriam (2009) wrote:

> Rather than determining cause and effect, predicting, or describing the distribution of some attribute among a population, we might be interested in uncovering the meaning of a phenomenon for those involved. Qualitative researchers are interested in understanding how people interpret their experiences, how they construct their worlds, and what meaning they attribute to their experience. (p. 5)

Rationale for the case study method.

According to Creswell (2009), a case study is a strategy of inquiry in which the researcher explores a program, process, or individual in depth using a variety of data collection procedures. Flyvbjerg (2011) maintained that the defining characteristic of a case study is the "demarcation of the unit's boundaries" (p. 301). Merriam (2009) also found the concept of the "bounded system" to be the most important aspect of case study research. She further defined case study by several special features; case studies are particularistic, descriptive, and heuristic (pp. 43-44).

McAdams and West (1997), writing from the point of view of personality psychology, identified three functions of the case study: exemplification, discovery, and comparison. Exemplification is using a case as an example of a theory, hypothesis, or "general life course" (p. 761). Cases that use discovery allow the researcher to use induction to build theory. Finally, case studies may allow the researcher to compare individual lives to theory, make cross comparisons between cases, or compare different theories.

Yin (2009) advocated use of the case study method under specific circumstances. "In general, case studies are the preferred method when (a) "how" or "why" questions are being posed, (b) the investigator has little control over events, and (c) the focus is on a contemporary phenomenon within a real-life context" (p. 18).

Based on the literature, the case of Hal B. is appropriate for a case study approach because the central question is a "how" question about contemporary events over which I have no control. The study lends itself to a variety of data collection procedures. The study is also bounded by Hal's experience of an encore career in education. Case study methodology allows the examination of the particular circumstances of Hal's experiences, allows for intensive description, and will allow the reader to better understand the phenomenon of the encore career. Finally Hal's case is both an example of a social purpose encore career (exemplification) and an opportunity to compare Hal's life experiences to existing theory (comparison).

Rationale for the narrative method.

According to Patton (2002), stories are memorable and provide better understanding and learning than research that is non-narrative; the language of stories is more accessible to non-researchers. Merriam (2009) maintained that stories are "how we make sense of our experiences, how we communicate with others, and through which we understand the world around us" (p. 32). Maynes, Pierce, and Laslett (2008) framed narrative as distinct in its focus on the whole person.

The narrative approach is most useful in its capacity to reveal nuances that may be neglected in other forms of inquiry. Webster and Mertova (2007) wrote:

> Narrative inquiry is human centered in that it captures and analyzes life stories. In doing this it has the ability to document critical life events in illuminating detail, and yet also reveal holistic views, qualities that give stories valuable potential for research. Stories are a reflection of the fact that experience is a matter of growth, and that understandings are continually developed, reshaped and retold, often informally. Narrative, and the

stories it records, offers research a way to highlight those understandings often not revealed by traditional modes of inquiry. (p. 13)

The procedures of the narrative approach require determining a research problem that involves learning the detailed life experiences of an individual or small group. The researcher spends extensive time in the field gathering stories through multiple types of data. The researcher collects information about the context of each story then analyzes, creates and arranges the story to create a narrative. Finally the researcher actively involves the participants in the research through collaboration (Clandinin & Connelly, 2000; Creswell, 2007).

Portraiture: A specific approach to narrative.

Hal's case lends itself to a particular approach to narrative inquiry known as *social science portraiture* which was developed by sociologist Sara Lawrence-Lightfoot. She described portraiture as:

> … a genre of inquiry and representation that seeks to join science and art. Portraiture is a method of qualitative research that blurs the boundaries of aesthetics and empiricism in an effort to capture the complexity, dynamics, and subtlety of human experience and organizational life. Portraitists seek to record and interpret the perspectives and experience of the people they are studying, documenting their voices and their visions— their authority, knowledge, and wisdom. (Lawrence-Lightfoot & Davis, 1997, p. xv)

The process of portraiture depends on five primary concerns: context, voice, relationships, emergent themes, and the aesthetic whole. In a portrait the researcher focuses on providing a detailed context including the physical context of place, the context of the researcher's perspective and beliefs, and the social, historical, and cultural context. The researcher's voice is evident in the portrait, serving as witness and interpreter. The voice also respects the researcher's preoccupation with his or her own theoretical framework, the researcher's autobiography, the voices of the participants, and the researcher's voice in dialogue with the participants. The portraitist navigates an intimate relationship with the participants marked by "empathetic regard" and a "search for goodness"; in other words, the portraitist does

not ignore the bad, but searches for the healthy or good example rather than focusing on the dysfunctional. Finally the portraitist searches for emergent themes and weaves the analysis into a coherent, aesthetic narrative (Lawrence-Lightfoot & Davis, 1997).

The blend of methodologies.

Hal is a person who has an unusual breadth of life experience. He is also a gifted storyteller, recognized by his colleagues and students as a compelling weaver of tales. Hal is also my personal friend and long-time colleague. The narrative approach, particularly the specific portraiture approach, is the methodology which best allowed me to describe the context of Hal's educational career. The portraiture approach also provided me with a model of how to deal with my close personal relationship with the participant by making that relationship an explicit part of the research. The case study approach is appropriate because it has allowed me to limit the study of Hal's life experiences to those which illuminate his experience of his encore teaching career.

Literature Review

I conducted an ongoing review of the literature in two phases. Before the formal research process began, I conducted a preliminary literature review to inform the process. The initial literature review focused on two topics: the encore career and generativity. After the data collection phase began, the ongoing literature review focused on two additional topics: McAdams's (1988, 1996, 2006a) life story model of identity and Mezirow's (1990, 1991) transformative learning theory.

IRB Approval

Following the initial literature review, I developed and defended a dissertation proposal. I then acquired approval from the Institutional Review Board (IRB) to begin collecting data in the study. The IRB documents included interview protocols for a semi-structured life history

interview with the primary participant as well as a protocol for semi-structured interviews with the colleagues of the primary participant. The IRB proposal also included informed consent documents for the primary participant as well as for his colleagues. An observation protocol for classroom observation was also included in the IRB documents.

Selection of Subjects

This narrative case study is the exploration of one individual—Hal B. Hal B. is a 70-year old, white male who followed up a 30-year career in manufacturing management with a decade long career as an instructor of leadership, management, and process improvement for working adult students at a regional university in the mid-south. Hal is a colleague with whom I have worked for more than 10 years. I began the research process with the idea of preserving Hal's narratives of his work experiences both in business and in education. The focus on the encore career and the theoretical framework of the story emerged from the choice of the study participant. Hal, therefore, is the primary subject of my study.

Hal participated in five interviews with me. The first two interviews were semi-structured life history interviews based on the interview protocols used by McAdams (2006b). Hal participated in three more interviews. One interview was semi-structured; the questions were based on findings from the initial life story interviews. Two additional unstructured interviews were also conducted. Hal participated in approximately six hours of interviews. In addition to interviews, I observed Hal in the classroom on three occasions and observed him consulting on site at a client business. In addition to interview and observation data, Hal also shared with me the manuscript of an unpublished business book that he wrote in the early years of his education career.

I chose to complement my interview data from Hal with interviews of Hal's current and former colleagues. I used criterion sampling to identify potential interview candidates; criteria for inclusion included extensive work with Hal either in class or in consulting, status as a faculty member, adjunct faculty member, or administrator, and acquaintance with Hal for more than four years. Ultimately, four of Hal's current and former colleagues participated in a semi-structured interview. Demographic data about the study participants is shown in Appendix A.

Instrumentation

In qualitative research, the researcher is the key instrument (Clandinin & Connelly, 2000; Creswell, 2007; Creswell 2009; Denzin & Lincoln, 2011; Maynes, Pierce, & Laslett, 2008; Merriam, 2009; Lawrence-Lightfoot & Davis, 1997; Patton, 2002; Webster & Mertova, 2009). As Creswell (2007) wrote:

> The qualitative researchers collect data themselves through examining documents, observing behavior, and interviewing participants. They may use a protocol---an instrument for collecting data—but the researchers are the ones who actually gather the information. They do not tend to use or rely on questionnaires or instruments developed by other researchers. (p. 38)

To prepare for interviews with Hal, I prepared an interview protocol for a life story interview based on protocols developed by McAdams (2006b) in his research on the redemptive themes in the personal narratives of highly generative individuals. In McAdams's approach, the interview subject is asked to consider his life story as if it were a book and divide the story into chapters. Then the subject is asked to identify eight key incidents including a high point, a low point, and a turning point. The life story interview protocol is included as Appendix B. Based on data from the life story interview, I developed a second interview protocol for Hal that guided our third interview. The second semi-structured interview protocol is included as Appendix C. Interviews with former students and colleagues were semi-structured with a series of set

questions about their experiences working with Hal. The interview protocol for interviews with Hal's colleagues is included as Appendix D.

In addition to interviews, I also conducted observations of Hal in the classroom and consulting on site with a client business. To guide data collection from observations, I created an observation protocol which is included in Appendix E. Other data sources informing the study included an unpublished book manuscript written by Hal, my personal research journal, and field notes I wrote based on informal conversations with Hal.

Data Collection Procedures

The research process was comprised of the following steps:

1. Before the research process formally began, I conducted a preliminary literature review focused on two concepts: the encore career, and generativity.

2. After my defense of the dissertation proposal, I acquired approval from the Institutional Review Board (IRB) to conduct the research. The process involved creating separate interview protocols for the primary participant and his colleagues as well as informed consent documents for both the primary participant and the secondary participants.

3. The primary research participant, Hal B., participated in a series of interviews. The first two interviews were semi-structured interviews based on McAdams (2006b) life story interview protocol. A second semi-structured interview followed in which the questions were written based on the findings of the first two interviews. Two additional unstructured interviews followed. Four interviews took place in Hal's office; the final interview took place in a classroom on-site at a client business. Each interview was audio-taped and transcribed word-for-word. Because I work in the

research site, I approached Hal in person to set up all interviews. Throughout the study I refer to Hal by his real first name and his last initial.

4. After the initial interview with Hal concluded, I contacted current and former colleagues via email and telephone. I conducted semi-structured interviews with four current or former colleagues about their experiences working with the primary subject. Each interview was audio-taped and transcribed word-for-word. Three of the four colleagues work in the research site with me; I approached three of the participants face to face about participating in an interview. I contacted the fourth participant via email. Throughout the study I refer to each of Hal's colleagues by a pseudonym.

5. In addition to interviews, I observed three two-hour class sessions for which Hal was the instructor. The first observation took place on-campus in a college-credit class in a workforce leadership associate degree program. The final two observations took place at a client site and included observation of two classes as well as observation of Hal acting as a consultant at the client site. Observations were not recorded, but were captured via note-taking and field notes.

6. Documents were also a source of data for the study. Hal gave me a copy of a manuscript of an unpublished business book he wrote early in his teaching career. I also kept a research journal and wrote field notes about informal conversations between Hal and me.

7. After data collection was completed, I conducted a second literature review that focused on two additional concepts: the life story model of identity and transformative learning.

Data Analysis and Management

The data analysis and management strategy occurred in two phases. The original strategy of data management was manual. As I completed interview transcripts and field notes, I completed an initial round of coding based on emergent and "in vivo" codes by writing directly on the printed transcripts. I created databases of coded material using Microsoft OneNote; I created an electronic notebook specifically for the research project. I created tabs for each initial code within the electronic notebook. I copied the coded blocks of data into each sheet. All printed material was stored in a file drawer in my home office; all electronic files were stored on a portable hard drive which could be locked in a desk drawer for security.

As the project continued, the amount of data to manage became daunting. Midway through data collection, I adopted a different data management strategy. I acquired the NVivo 9 qualitative analysis software and imported each of my electronic files into the program. Guided by my original emergent coding scheme, I electronically re-coded each of my documents. The result was a new coding scheme which included emergent or in vivo codes as well as categorized codes based on the theoretical framework of the study.

To determine the findings of the study, I used a framework of the six questions that guided the study. Categories of codes were sorted into a working outline that allowed me to answer each question that guided the study. Program features of the NVivo 9 software allowed me to filter the database to display all passages coded in particular "nodes" or coding categories. Data were compared within and across question categories to arrive at the findings and the interpretations of the studies. The electronic database of the NVivo 9 data was stored on the same portable hard drive on which the original electronic documents were saved.

Limitations of the Study

A number of limitations apply to this study:

1. As a qualitative study, the findings of this narrative case study are not generalizable to a larger population. Instead, I have relied on "thick description" (Clandinin & Connelly, 2000; Creswell, 2007; Creswell 2009; Denzin & Lincoln, 2011; Merriam, 2009; Patton, 2002) and detailed discussions of the specific context in the attempt to provide enough information to the reader to decide if this particular case may be transferable to other situations.

2. Because I have chosen to complete a study "in my own backyard" (Creswell, 2007), researcher bias is a possible limitation. To deal with issues of my own bias, I have chosen to use the portraiture approach in which the researcher openly acknowledges his or her own research agenda, opinions, and point of view. By explicitly discussing biases, I have attempted to provide the reader with enough information to come to his or her own conclusions.

3. The primary participant Hal B. is extremely articulate; not all the other participants are equally articulate or perceptive (Creswell, 2009).

Role of the Researcher

In conducting this study, I took on an unusual role. Using the lens of constructivism, I conducted this study in my own work place; the primary participant is a long-term colleague and close friend. I am a full-time faculty member in a business outreach program in a regional university. The university is a unique institution which has moved from community college to university status in the last 10 years. While the institution has expanded to include baccalaureate programs, it has also maintained its associate degree and certificate programs. These programs

are housed in the College of Applied Science and Technology (CAST); because the mission of CAST is outside the primary mission of the university, CAST instructors often feel like "second class citizens" within the university community.

Both my primary participant Hal and I came to the university after careers in the business world; each of us was hired with only a baccalaureate degree because we had the significant experience necessary to work with local business and industry. My post-graduate education has taken place since I began teaching at the university. Hal and I both share a preference for practical application and experience in our teaching. As I began the research project, I initially tried to back away from my personal connection to Hal and his work in the classroom. As the research progressed, however, I realized that our relationship is part of the story—an important element that can be explored to provide additional insight into Hal's experience of his encore career.

I also have another personal connection to the research site: I grew up on campus. My mother worked for the university from the time I was age 12 until she passed away when I was 27. The university has been a part of my life since childhood. I have a strong sense of loyalty to the institution as well as the insider's knowledge of the dysfunction at work within the university.

Throughout the research project I acted in the role of participant observer. Each of the participants I interviewed knew me well. Many of the students in Hal's classes know me and have been in classes that I have taught. To provide the most balanced possible portrait of Hal and his encore career, I have tried to directly address my presence in the interviews and observations and to openly address my own point of view and how that point of view may conflict with those offered by the participants in the study.

Issues of Trustworthiness

In quantitative research the standards for trustworthiness are *validity* and *reliability*. Qualitative research uses its own language for evaluating trustworthiness: *credibility*, *dependability*, and *transferability* (Bloomberg & Volpe, 2008).

Credibility.

Credibility refers to how well the researcher's portrayal of participants matches their own perceptions. Credibility in qualitative research is a parallel concept to the quantitative concerns of internal and external validity (Bloomberg & Volpe, 2008). I have addressed issues of credibility through the following practices:

1. I have clarified the bias that I bring to the study by addressing it explicitly in this chapter and throughout the study. The methodology of portraiture brings the "voice" of the researcher to the forefront, so that the reader may come to his or her own conclusions considering the credibility of the researcher.

2. I spent five months in the data collection process and I work in the research site; this prolonged time in the field allowed me to gain an in-depth understanding of how Hal's life experiences have influenced his encore career.

3. In an attempt to confirm the validity of my data, I use triangulation of data sources and data collection methods. I collected data from multiple sources (Hal and four of his colleagues) and used multiple data-collection methods (interviews, observations, and document analysis).

4. I have sought out negative and discrepant findings and discuss them in my findings and interpretation of the data.

5. To ensure that my biases were not influencing my analysis, I used member checks to check the accuracy of my findings. I shared transcribed and interpreted data with

each participant. I incorporated any suggestions or changes I received from

participants.

6. I also used peer debriefing to gain additional insights about my work. I shared drafts

   of my work and discussed progress of the project with a small group of peers

Dependability.

Dependability refers to how well one can track the procedures used to collect and analyze

data. Dependability is a parallel concept to the quantitative concern of reliability (Bloomberg &

Volpe, 2008).

I have addressed issues of dependability through the following processes:

1. I have compiled both paper and electronic databases of my data to provide an audit

   trail for those who may wish to examine my work process.

2. I have created an audit trail by explicitly outlining my procedures for data collection

   and analysis in this chapter.

Transferability.

Transferability is the parallel concept to the quantitative term *generalizability*;

transferability refers to how well a study makes it possible for the reader to determine whether a

similar phenomenon is possible in their own setting or community (Bloomberg & Volpe, 2008).

I have addressed issues of transferability through the following practices:

1. I have used rich, detailed description known as "thick description" (Clandinin &

   Connelly, 2000; Creswell, 2007; Creswell 2009; Denzin & Lincoln, 2011; Merriam,

   2009; Patton, 2002). Thick description provides the reader with a realistic picture of

   the phenomenon.

2. I have included in-depth details of the context of the study. The study includes

   contextual information about the community and institution, the history and culture,

   and the researcher's individual context.

Chapter Summary

This study uses a narrative case study design which is a blend of two approaches to

qualitative research: the case study and narrative. A specific narrative approach known as social

science portraiture is the method used in this study. The study has been bounded by Hal's

experience of an encore career in education creating a bounded narrative. This chapter has also

considered a description of the study variables, selection of subjects, instrumentation, data

collection procedures, data management and analysis, limitations of the study, role of the

researcher, and issues of trustworthiness.

Chapter Four

PORTRAIT OF HAL

Social science portraiture is a technique in which the researcher uses context, voice, relationships, and emergent themes, and aesthetic whole to create a written portrait of the subject. In this chapter, I focus on creating a portrait of Hal as teacher and consultant. I also bring attention to my personal relationship with Hal and how my relationship with him colors my attitudes in analyzing the data from this study.

Riverton

Riverton is a town of more than 80,000. A small city built on the banks of a major river and on the state line between two mid-south American states, Riverton was once known as a gateway to the old west—the last civilized stop before 19th century travelers reached Indian Territory. Riverton is now the second largest city in a small state and a hub for manufacturing. Originally Riverton's economy was built around the manufacturing and transportation industries. Now while both of these sectors are major players in the local economy, health care, service, and retail industries have diversified the economy. The city feels like suburb of a large city but no large city is nearby. Instead Riverton itself is the market center of a statistical metropolitan area that comprises six counties and a population of more 200,000. Riverton is the urban center of the rural counties that surround it in two states. The rural residents flock to Riverton to shop, to drink, to eat in its restaurants, and frequently to work or attend college. Thriving in a small way, Riverton is not progressive; the major business center in the state has emerged 80 miles north in the northwest section of the state.

The State University at Riverton is an unusual institution—a successful community college for more than 70 years, State University at Riverton is now a four year institution that continues to deliver associate degrees and technical certificates. The campus is a showplace with

green expanses of lawn and careful tree and flower plantings. Several new construction projects are underway. An up-start as a university, the institution is quickly making a name for itself as a four-year institution.

On the corner of one of Riverton's major avenues sits the university's business and industry building. This building houses the burgeoning college of business as well as a small business and professional center that handles contract credit and non-credit training, open enrollment professional development courses, and an employee-sponsored associate degree program in workplace leadership. This building complex sits at the corner of a busy intersection. A short cross-walk journey away from the manicured campus and its tobacco free policy, a small group lounges on the corner smoking on a mildly chilly February day. The five men are students in the workplace leadership associate degree program. Dressed in jeans and work boots, some in pullover fleece, some in windbreakers, all in ball caps, the men are informally circled around a slight man in his early 70s. Standing with military precision like the Army drill instructor he was more than 40 years before, the man speaks quietly but with authority. His tan windbreaker has a name embroidered in simple black script: *Hal*.

The Corner of Hal and Grand

Students have dubbed this intersection "the corner of Hal and Grand". Hal and his smoke breaks have become an institution for the students in the leadership program. At the top of each hour, the students discuss their real life work problems in the informal, break-time atmosphere. The smoke breaks are a sly management technique Hal perfected in more than 30 years managing large manufacturing plants in the HVAC and furniture industries.

Today's "Hal and Grand" session is apparently typical. Hal leans back against an electronic control panel as traffic whizzes through the intersection. This is a busy thoroughfare,

but Hal ignores the traffic as he speaks quietly with a young man in his thirties. The young man is describing his son's sports team and mentions that his son is getting tall. Hal, only 5'8" himself, mentions that both his sons—now in their thirties—have now long grown taller than him. Although I have known Hal for more than 10 years and think of him as a close friend, I am an outsider here. I stand on the corner the only female in this particular group. I am a non-smoker embedded in a cloud of second-hand smoke, coughing discreetly. The topic of conversation is distinctly non-work related tonight. As I turn my head away for a gulp of fresh air, I wonder if I am the dampening factor on the conversation.

The students are stubbing out cigarettes and preparing to venture across the intersection to return to class. As we cross the intersection, Hal watches me carefully to ensure I make it safely through the crosswalk. I'm used to this treatment from Hal. He has a courtly manner with women, although in my experience he is not afraid to make his opinions loudly and explicitly clear. This is one of many contrasts in his personality. As we approach the building, Tom, a student in his mid-forties, bearded with a long-pony tail, approaches us.

"What is the definition of basic?" Tom asks anxiously. Hal chuckles.

"Don't get too ambitious," Hal says to him.

Testing the Limits

We are one hour into a class called Total Quality Essentials. Tonight's topic is descriptive statistics. We are in an older classroom. Along one side of the room a bank of cabinets and bookshelves is painted a muted red. The bookshelf contains a small library of books on manufacturing and quality, most of which Hal has personally purchased and brought into the classroom. A table at the front of the room holds a small table-top lectern. Hal has placed a name tent made from gray card stock atop the lectern. The name tent reads *Hal-D*

printed in thick black magic marker in an almost calligraphic script. The *D* stands for Dominant, Hal's personality type using the *DiSC* personality profile. I notice that the students each have a matching gray name tent with their name and personality profile printed on them; the name tents are still in use six weeks into the semester.

Hal stands at the front of the classroom, holding a paper coffee cup. Hal's colleague Kendall describes him as a "sharp dresser". He is dressed in khaki pants with a long-sleeved collared knit shirt that is also khaki with a muted stripe. Although Hal is 70, he carries himself with the ease of a much younger man. His clothing is sharply pressed. On several occasions Hal has mentioned checking his "gig line"—the buttons of his shirt, his belt buckle, and the fly of his pants line up in a perfectly straight line, a habit maintained from his army days. Hal's hair is grey and thinning on top. He wears gold toned wire-rimmed glasses.

The students sit at long tables facing the front of the room. Although the smokers at break time were mostly male, the class itself is mixed. Approximately a third of the 27 students are female, almost all non-traditional students. In fact only one traditional student attends the class—a Japanese exchange student. Four or five students appear to be of Hispanic descent; one student is African American. The other students, ranging in age from late 20s to early 50s, are Caucasian. I sit in the back of the class at a long table that faces the back wall. I sit sideways in my chair taking notes. The students in this particular class know me; I covered the first night of the semester for Hal several weeks earlier so I am a familiar face. I have been observing the class since it began an hour earlier.

Hal began the class with a slide show of snow scenes embellished with inspirational leadership quotes. Over the years Hal has developed a collection of slide shows that he plays before each class, setting the tone for what will come. As the students enter the classroom, Hal

enlists an older male student to be "in charge". He hands the student a service bell to be rung as a call for breaks.

Hal kicks off the class with a slide that outlines the session to come—a discussion of manufacturing control charts. In the previous class session students were asked to design and test-fly paper airplanes. Only two students actually attempted the airplanes. One student shares that his airplane "crashed and burned". Another student created a plane that did not meet the prescribed specifications of between 25 and 35 feet in flight. In a quiet voice, with a mock "fierce" attitude, Hal chides the group as "leaders and adults to whom I gave an assignment that my 10 year old grandson could complete". The group laughs but shifts uneasily—point made.

As Hal reviews topics from the week before, he assumes the role of an elderly, forgetful man. He asks the class to remind him what they learned the week before. A student mentions the term *mean*; Hal asks the group if they learned how to be mean. Another student mentions *range*. Hal asks, "Where cows roam?" Slowly he coaches the group into describing basic descriptive statistics—mean, median, mode and range. He reviews range carefully explaining that this concept is frequently misunderstood.

As Hal sets up the class he elaborately names teams: "Team 1, because they are number 1. Team 2, because they aren't as good as Team 1. Team 3, because third time is a charm". Hal explains that each group will construct paper airplanes and then test them.

Having set the expectations for the class Hal ties the coming experiment into material they had previously covered. He shows the group an example of a control chart with data points that show special cause violations, run violations, and trend violations. He asks the class, "Are these numbers acceptable? It's your plant. You're the plant manager". Throughout the discussion Hal speaks softly but encourages the students to challenge him. He purposely states

things in a slightly inaccurate way encouraging students to stand up to him and challenge what he says.

After the discussion of control charts, Hal returns to the practical assignment. He hands each student a printed work instruction on how to fold a paper airplane. The instructions include both written instructions and illustrations. As he hands out blank paper for the activity, he says, "I'm going to teach you to make a paper airplane. How would you like to have me do that? Is there anything you need?"

One student says, "Show me". Another asks for a model. In response Hal displays a video on his laptop: a close up view of hands folding a paper airplane. Without further prompting students begin folding the paper airplanes according to instructions. Some watch the video while others follow the written instructions. When the video ends, Hal starts it over. When the video ends a second time, a student asks for it to be played again. Hal plays the video again. Hal allows the individual work on the airplanes to continue for five minutes, and then he says "Did I mention that this was a team experience?" This simple comment prompts the students to begin working together. Each student creates his or her own plane, but now the students compare their products and help each other with the folding.

Hal asks the group, "How are you going to determine who pilots the plane scientifically? Can I just say arbitrarily that Debbie is the best one and I like her?" The group suggests testing the airplanes. Hal asks the group what they need. Several students mention measuring tape. Hal begins handing out measuring tapes but only to the groups that request them. He asks the group how they will know how far 25, 30 and 35 feet are. A student asks for something to mark the floor. Another student mentions tape; Hal hands him a measuring tape. Laughing, the student says, "Sticky tape!" Hal tears lengths of blue painter's tape from a roll and hands a three foot

strip to each group. At one table the tape sticks to Hal's pant leg, and he tugs at it in mock exasperation before handing it to a female student. The students laugh.

From my perch at the back of the room, I am delighted along with the students. Hal has a presence and charisma; he is a performer at heart. I have observed Hal in the classroom many times. He is my colleague and my friend. His office is next door to mine. We have collaborated closely for more than 10 years, but this experience is different. For the first time I am studying Hal. The experience is disconcerting. Stepping back from my normal interactions with this man whom I admire, I feel as if I am trying to pick apart and analyze the components of a delicious meal. Hal is a man from whom I have learned much already. Now he is a subject of formal study.

Hal asks the group to look at the back of the work instructions; the back of the paper has 30 blank lines printed on it. He asks them how many test flights it will take to determine who should "pilot" the plane and which student's design to use. One student suggests having each group member throw each plane five times. Another student suggests 30 throws because there are 30 lines on the back of the work instructions. Hal asks the group to throw 20 times. Each group goes to a different part of the building using the hallway as a runway for the paper flights. The building is a general use classroom building attached to another building which is the headquarters for the university's college of business. Three groups occupy the main hallway from the building entrance to the connecting hall with the other building. Two other groups claim sections of hallway in the connecting building. As we watch the teams set up, Hal gleefully mentions to me that the Dean of Business hates this exercise.

Hal and I watch as the groups set up marks on the floor at 25 feet, 30 feet and 35 feet— the lower control limit, the target, and the upper control limit. He moves from group to group

pointing out that the carpet squares on the floor are two feet square. Each group goes through a number of test flights discovering how best to throw the plane. Hal moves from group to group speaking quietly with the members and making humorous comments.

Between group interactions he speaks with me. Away from the students he relaxes for a moment. He seems tired and his eyes water. He mentions that his allergies are bothering him and I feel worried for him. Hal has had a difficult year. His wife of 50 years has lost her battle with Alzheimer's disease three months earlier. Hal puts on a brave front, but I know from our many private conversations that he finds respite from his stressful year in teaching these classes. The hours take their toll on him. One paper airplane circles overhead and crashes smartly into Hal's head. He jumps up with a mock look of anger at the group then hands them their paper airplane. He seems energized by the laughter he receives in response.

After the "Hal and Grand" break, Hal debriefs the experience so far. He mentions a female student who says she throws like a girl. "If she's an elite athlete, that could be a good thing. What do you surmise she meant?" He returns to the concept of data. "Should we use data or just say Deborah is really good at it?" He reinforces the importance of data by assigning an official score keeper and a spotter to call the measurements.

The students return to the hallway to discover that the "runways" of tape been pulled up. Sighing, Hal returns to the classroom to get more masking tape He measures out a new official runway, marking the 25, 30, and 35 foot targets with strips of tape. The students have selected the best plane and best pilot in each group. Each pilot will make five throws in rotation. As the competition begins some of the planes fly far beyond the test area. Some fall short. At least one plane lands in a light fixture above Hal's head. As other students pass through the hallway, they

comment on the activity. "I wish I could do that in my class," says one young male student before he sighs and enters a classroom off the hallway.

When each group's pilot has tested its plane, Hal brings the group back to the classroom where he carefully enters the scorekeeper's data into a pre-prepared spreadsheet. The spreadsheet automatically calculates mean and standard deviation. The groups discuss the figures excitedly, disagreeing on how the numbers should be interpreted. Hal leads a discussion between two teams. Hal likes to tackle issues of diversity. One of the best pilots is the Japanese exchange student. He asks the student to bear with him. He mentions that the student is Japanese and therefore, precise and competent. He says that he thinks based on the fact that the pilot is Japanese that his group is best. Then he asks which group was next best. Another group pilot raises his hand. The pilot happens to be the only African American student. Hal says, "I'm not even going to go there". The students laugh, especially the African American student. Hal asks if they can determine who is best based on the race of the pilots. He then returns them to the data and asks how they can prove it through data. The group decides to test the two best pilots to see the scores. The group returns to the hallway to test the pilots. Hal asks the pilots to throw five times using their own plane, then to switch planes and fly five times again. When the pilots switch planes the results are well below the control limits. Hal brings the group back to the room and enters the scores. Then he leads a discussion of who is best. The group determines that Team 3 with the Japanese pilot is best, based on the data. Hal begins to discuss how important data is when the student "in charge" rings the bell for break.

Hal and Me: A Brief History

Our director has described Hal and me as "each other's heroes". We have an unlikely friendship. Hal is 70, male, and a political conservative. I am in my forties, female, and

politically liberal. We are very different, yet we share a number of personality traits and a similar philosophy of teaching. We are both performers. We have forged a relationship out of mutual mentorship. In the past 10 years I have taught Hal how to use business computer applications to prepare his classroom materials and activities; Hal has taught me how to conquer my temper and to deal with people more successfully at work.

Hal had been around for a while as a nodding acquaintance when he and I first connected. On September 11, 2001, Hal was the person to whom I radiated in the aftermath of the terrorist attacks that day. He was calm. He was reassuring yet realistic. We became friends, not just colleagues, during the months following the terrorist attacks.

Over the years we have co-taught, sat in on each other's classes, and spent hours talking. When I realized that oral history or narrative was a viable research option, Hal was the first person who occurred to me. I felt compelled to record his stories, to document what I see as his wisdom. When we began our interviews, I had to take a step back and look at our relationship from the outside. At moments I have successfully set our relationship aside, but as our interviews continued my attitude changed. I decided our relationship was a part of the story. As the interviews progressed they became conversations.

Conversations with Hal

My first interview with Hal takes place on a cold January morning, one week before spring semester classes begin. Ultimately Hal sits through five interviews with me, beginning in January and ending in May. This has been a difficult year for Hal—his wife of 50 years, Dixie, passed away after a 15-year battle with Alzheimer's disease. In the past year he has watched the woman he has described as his "anchor" become violent. He has visited her daily in the locked ward of a nursing home until fall when she stopped speaking, walking, or eating. In mid-

October, Dixie passed away. In thinking about Dixie's importance in Hal's life, I struggle. I

have no wish to exploit her memory or invade Hal's privacy. But Dixie is an important element

in Hal's story; to avoid her feels like eliminating a major aspect of the portrait.

Hal has struggled with stress from Dixie's health care issues and from the stress of the

grief process. He has suffered episodes of uncontrolled high blood pressure and debilitating

allergies. In the five months that I interviewed Hal and observed him in action, I have seen him

change. In January, the loss was fresher and his health more fragile. By the time of our last

interview in May, the sun is shining and Hal's health is improved.

As we conduct our interviews, I observe Hal's familiar office with a fresh perspective.

Hal's office reveals a whimsical streak at odds with his sometimes stern demeanor. In his office

he has a modest collection of plush monkeys and chimpanzees which he tosses to his students to

illustrate the concept of passing off responsibilities—the proverbial "monkey on your back". It

is not unusual to see these monkeys flying through the air in Hal's classroom. Today the

monkeys hang from the ceiling tiles in his office. A small pink chimpanzee Beanie Baby is a gift

that I bought for Hal several years ago; another gift from me—a grizzled, elderly stuffed gorilla

with a wizened, wrinkled face—sits in pride of place on his window sill. An unusual paper

posted on Hal's wall catches my attention. It shows a numeric code in huge bold type in an

attractive font. On closer inspection, I am amused to realize that this is Hal's long distance

telephone code posted for easy access. Hal's interest in Asian culture is evident from his office.

Hal has posted a series of Japanese characters on the narrow window of his office. A bottled

Japanese edition Coca Cola—a collectors' item—is displayed in the window. A stack of small

pocket editions of the *The Art of War* are stacked on his windowsill, ready to be given away to

interested students or clients. On his computer screen is a composite photo of Hal's late wife

Dixie and Hal's grandson at his recent baptism. The effect is as if Dixie is watching over the boy. Hal has spent hours creating this image, using his scanner and PowerPoint to create the wallpaper image.

Hal and I conduct our interviews in this office. During the first interview Hal is surprised by the personal nature of the questions. He answers briskly at first—formally. As he begins to tell familiar stories, he relaxes. I feel as if I am listening to Sheherazade weaving a 1,001 tales. As we continue to meet for interviews and chat informally about the project, it seems to me we both look forward to these conversations.

Other Voices

Hal is a storyteller but he also figures strongly as a character in the stories that people tell in our department. As I interview others about Hal I ask each participant to tell me a story about Hal.

Jan's Story.

Hal's director, Jan shares a story about Hal's "tell it like it is" approach to consulting. Hal was working with a company that had a difficult plant manager. Hal was hired to teach the concepts of lean manufacturing to the employees and to help the company implement lean processes. The plant manager insisted only that the lower level employees be trained; the manager did not want to train managers and supervisors. Hal said, "Well, I think that's a mistake, but that would be fine. My boss would really like it. I'll train all of your shop floor people, and you can write me a big check to do that. Then it will fail, and I'll come back and train your managers and your supervisors. Then I'll retrain the people on your shop floor and you'll write me another big check and you'll make my boss really happy". Jan adds an interesting epilogue to the story: "But it's amazing though. That happened yesterday in the

afternoon and at nine o'clock this morning they called Hal and invited him back to the plant and said, 'Tell us what we need'".

Peter's story.

Hal's chancellor Peter also provides a story about Hal's surprising personal hobbies. Peter invited Hal to participate in a session with undergraduate students who are chosen for a special leadership class with the chancellor. The group traveled to a conference center which featured a karaoke system. Unknown to Peter, Hal is a karaoke buff. By the end of the first evening Hal figured out the karaoke system and performed several numbers before turning the system over to the students. Peter says, 'people can always surprise you with what they can do".

Kendall's story.

Hal's co-worker Kendall tells a story that describes her experience of the "corner of Hal and Grand. While co-teaching a class with Hal, she joined him at the corner of Hal and Grand. A Riverton native, Kendall's father graduated from high school with Hal. Kendall shared that her father had stopped smoking. Hal told her that he wasn't planning to quit smoking. He gave her a lengthy lecture on the benefits and costs of smoking taking into account statistical life expectancies. She says, "He would die before he reaped the benefits of quitting smoking. Thus he may as well keep smoking, take his chances, and die at the median age".

My story.

In listening to the stories the colleagues tell me, I am reminded of a story that I tell frequently about Hal. I recorded this story as a blog entry several months before the start of data collection:

> When Hal likes you, there is no kinder man on Earth. When Hal dislikes you, he can make life very uncomfortable as a former colleague discovered. John Doe was a fellow instructor universally reviled by our internal staff members. John Doe was famously late for everything, including his classes. His lateness and lack of organization caused extra work for our support staff. He was also

rude. One day at 4:25 p.m. he asked a secretary to make copies for him. Her regular work day ended at 4:30 p.m. She had made 300 copies of a course evaluation for him the day before. Unfortunately she made the copies on salmon paper. According to John Doe salmon paper was "pink" and male students are uncomfortable with "pink". The secretary stayed late to recopy the evaluation forms on blue paper.

Hal hates rudeness. He also hates stupidity. He thought the idea of men being offended by pink paper was the silliest thing he ever heard. He took action. Whenever Hal met with John Doe, he wore a pink shirt. If we had a meeting, Hal stole the agenda and ran a copy for John Doe on pink paper. Hal posted notes to John Doe on his office door printed on pink paper and featuring various pink flowers. This did not happen for a week or two; this happened for YEARS. When John Doe left for greener pastures three or four years later, Hal created a goodbye card that resembled a frilly pink valentine. Did I mention that Hal is my hero? (Voelkel, 2010a)

Faces of Hal.

Hal has played many different roles in his life. Students are frequently struck by his wide breadth of experience. Throughout his life Hal has worked in HVAC and furniture manufacturing. He was an Army drill instructor in the pre-Vietnam era. Hal's many hobbies have led him to dabbling in other professions including crappie fishing, square dance calling, and singing. Hal's love of music has inspired him to amass a collection of nearly 5,000 karaoke songs that he plays on a professional grade sound system. His interests and talents include activities that range from riding motorcycles to showing horses to a more professional interest in lean manufacturing processes. Hal's particular mix of experience and skills is unique.

Consulting at Acme Motors

As I reach the end of data collection, I decide to go with Hal to a training and consulting assignment in the small, rural town near where Hal grew up. Acme Motors is a manufacturing company with significant problems. It is located in Ada, a small "red-neck" town. Ada has a non-diverse population; there are essentially no Hispanic, Asian or African-American residents. As we drive the two hours south to reach Ada, Hal tells me a story about how residents of Ada

lynched a black Pullman porter in the 1920s. When Hal was a child he remembers a sign posted in Ada that read "Nigger, don't let the sun go down on you in this town". I am horrified.

As we drive in Hal's tidy black pickup truck, he tells me about the community where he grew up. Hal was born just over a mountain range from Ada. He calls his birthplace "Down Home". He describes seven-hour drives over gravel roads to reach Riverton when he was a child. It took three hours to drive from "Down Home" to Ada, then another three or four hours over difficult roads to reach Riverton. The drive now takes less than two hours on paved roads.

When we reach Ada we check into a small, old-fashioned motel. As we eat dinner in a pleasant Mexican restaurant, Hal tells me more about Acme Motors. The plant has recently been purchased by a Japanese owner for cash. The purchase has instigated a "huge culture change" for the organization; the plant is dysfunctional, Hal tells me—a major issue for the Japanese owner. After dinner we drive by the plant. Acme Motors manufactures electric motors; sample motors are mounted like statues outside the plant doors. According to Hal "the little plant manager" is a nice man but ineffective. Last year Hal conducted training for the managers and supervisors. The current training project is leadership training for "lead people"; these employees are not supervisors but are team leaders. In other words, Hal tells me, the employees have no real positional authority other than the ability to "run tell Mama".

We arrive at Acme Motors at 6:15 a.m. for Hal's 7 a.m. class. Hal's supplies are neatly packed and strapped onto a small rolling cart with bungee cords. Hal has been given an Acme name badge for entry into the plant. He swipes his card while I sign the visitors' book and take a visitor badge. Hal rolls his cart through the front offices of the plant. We walk through a long corridor that appears to be a professional or engineering area. The computer screens display technical drawings; a large plot printer sits idle in a cubicle area. We enter the

classroom/conference room which is marked with a sign reading Tornado Shelter. Tornados are a fact of life in Ada in the spring. The day is a beautiful crisp sunny spring day but the entire week before has been stormy with river flooding. Ada has had tornadic thunderstorms the previous two weeks that Hal has visited; in fact, Ada is still recovering from widespread damage from a tornado that destroyed much of the town two years previously.

Hal is dressed in dark gray dress pants, dress loafers with tassels, dark socks. He is wearing a blue button down shirt, crisply pressed. The sleeves have a sharp crease as do his pants. I wonder if Hal does his own ironing now that his wife Dixie has passed away. Suddenly self-conscious, I smooth my own knit blouse chosen because it does not require ironing. I find a seat in the classroom.

The room at Acme Motors is oblong. A long octagonal conference table sits in the middle of the room with comfortable upholstered rolling chairs surrounding it. Six smaller tables are organized around the room with two upholstered chairs at each table. I sit at the second side table on the left of the room with my notebook. A large screen is at the head of the room with a flip chart next to it. The walls are covered with a giant cork board on the left side of the room with nothing posted on it. On the right side of the room there is a giant flow chart posted on the wall perhaps six feet long and four feet high. This shows what I presume to be a manufacturing process flow. It is color coded with arrows showing different processes. Another poster shows the Safety Pyramid—a pyramid chart showing the levels at which safety should be emphasized.

By 6:32 a.m. Hal has his equipment ready. He begins a slide show that contains photographs of mother animals with their offspring. Slides feature polar bears and their cubs, mother and baby elephants with trunks entwined, a tiger mother and baby, a mother dolphin with

baby dolphin, and finally a human mother holding a toddler upside down by the leg. The final

slide reads Motherhood. I guess correctly that this particular slide show is in honor of the

upcoming Mother's Day holiday. The slide show is on a continuous loop that plays as students

enter the room.

I write in my notebook that Hal likes to be in control. He tries to control every possible

aspect of his environment. I relate to this need for control. I usually tightly control my own

classrooms although I'm far less precise. Hal sits for a few moments sighing. I ask if he is all

right. He says he is not a morning person and that he will "sigh and make faces" for most of the

morning.

A man walks in the classroom and shakes Hal's hand. This is the production manager of

the plant. Apparently this manager sits in on each class. I wonder how this affects the openness

and participation of the students. Apparently the week before, two students in the morning class

were very disruptive. The production manager apologizes for the students' behavior, but Hal

promises to handle the situation. The two men seem comfortable with each other. Hal sits in his

chair leaning back and relaxed. The manager stands or paces around the room. The two men

begin a discussion of guns that I have a hard time following. I often forget that Hal is a self-

described country boy—a dedicated hunter and professional crappie fisherman.

Kellie, the human resources manager who hired Hal to do the training, enters the room.

She immediately sits down close to Hal. Kellie is a tall blonde woman who appears to be in her

mid-fifties. She wears a red windbreaker with the company's previous logo—the logo in use

before the company was purchased by the Japanese owner. She wears black twill pants with

heavy black work shoes. She wears a black and white untucked, vertically-striped, button-up

shirt. Her hair is short and casual. Her blunt manner and Texas dialect make her seem approachable to me.

I have met Kellie once before, but she cannot remember my name. She seems uncomfortable with my presence. Hal says, referring to me, "She's all right. You can trust her". Kellie mentions a "situation" that has developed and apologizes to me as she pulls Hal into the kitchen area to speak privately. A male student walks in to the room singing wordlessly. He walks into the kitchen area to get a drink, breaking up Hal and Kellie's private conference.

It is almost time for class to begin. Hal comes out of the kitchen and rummages through a box at the front of the room. He hands me a white three-ring binder containing the slides for his session. Students are beginning to enter the room. The dress is casual: T-shirts, jeans, and work boots. The production manager and the plant manager are dressed differently; there is a distinction of dress here between the workers and management. The production manager wears blue chino pants, a plaid shirt, and the black work boots that seemed to be required for everyone on the premises.

The sole female student appears to be in her mid to late thirties. She has long strawberry blond hair, coarse in texture pulled back into a high ponytail. I'm struck with how much hair she has; out of the pony tail I suspect her hair is waist length. She is slight, wearing a large button-up work shirt with her name embroidered on a patch on the left chest area. The shirt hangs loosely on her—a man's shirt on a petite woman. I suspect that this must be one of the disruptive students—her energy is very strong and uncontrolled. She walks up to me and thrusts her hand out to be shaken.

Students bring out name tents—grey card stock folded in half lengthwise printed with the university logo. The students have written their first names on the name tents in marker. At 6:58

the room fills up. As they enter Hal sits in the chair at the head of the conference table, leaned back in chair, arms folded across his chest. The room is chilly. I wonder if Hal's arms are crossed because he is cold.

All the students are Caucasian. There are several young men in their late twenties or early thirties. One older male student appears to be in his sixties. The dress reflects the factory work these people do but also the rural setting of this small town. It is an unseasonably cool day for May. The men wear corduroy field jackets, camouflage hunting jackets or hoodies, and camouflage caps. One of the camouflage caps has the Acme logo embroidered on the front. "Safety Pays" is printed in a semi-circle above the adjustable opening in the back of the cap. Discussion of fishing, hunting, and guns is the currency of common small talk among this group.

With all eight students in place, Hal begins the class at 7:02 a.m. Hal greets the class. He mentions that during the first class session several weeks earlier, he asked them to read a story. In the story a buzzard, who used to be a king in his own land, relies on monkeys to feed him. He prompts the students gently as they call out the plot points; the buzzard starves and monkeys starve trying to take care of him. One student says the moral of the story is "Change or Die".

Earlier Hal sat in his chair sighing. Now the class has energized Hal. He stands at the front of the room, military straight, hands in his pants pockets. He asks them the name of the buzzard. When the students do not remember, Hal reminds them that it is Philip Horatio Dubois—initials Ph.D. He tells them the buzzard died because it had too much knowledge to adapt to a new culture.

Now full of energy, Hal mentions that the pre-class slides are his Mother's Day gift to the class. As the class watches the slides, he links the photos to the work environment. A photo of a

giraffe nuzzling its young appears. He asks the group if that kind of behavior could happen at work. The class agrees. The word *nurturing* is mentioned. Another slide appears—a human mother holding a toddler upside down by one leg. He asks if the group has ever felt "shaken by the hind leg" at work. The group laughs, nodding.

Once the group is engaged, Hal asks each student to describe the best leader they ever knew. As Hal asks each student individually, he sits down, putting himself on the students' level. As the students share their stories, I am amused when one young man describes a boss's "photostatic" memory. As Hal asks his questions the students exhibit body language that suggests they are engaged. Most of the men lean back in their chairs but seem alert. One student—male—leans forward in his chair. Hal sums up their comments, then shares stories about his own grandfather and father.

Because the class was derailed last week Hal was not able to cover all the material planned. He makes up for lost time now. He points to a flip chart. A rectangle is drawn on the flip chart with a black dot in the exact center. This drawing is apparently a relic from last week's afternoon class. He asks the group if they remember the exercise. I perk up. This is a well-known Hal maneuver. He knows that they did not complete this activity; he is playing "senile old man" for effect—an observation I confirmed with him after class.

Hal hands the female student a sheet of white 8½ X 11 paper with a nickel-sized black dot drawn in the exact center. Hal goes to the flip chart. He asks the students to describe what is on the piece of paper. One student suggests a circle. Hal draws a large 15 inch diameter circle on the flip chart. Another student corrects the first. He mentions a dot. Hal draws a small dot in the upper right section of the flip chart. The students laugh. Another student suggests an 8 ½ by

11 "square". Hal repeats, "An 8 ½ by 11 square? Are you sure?" The student confirms. Hal draws a square on the flip chart. The students laugh.

Another student suggests starting fresh. Hal turns the flip chart page. The student suggests an 8 ½ by 11 rectangle. Another student offers Hal a tape measure. Hal takes the tape measure and draws the 8 ½ by 11 paper size on the flip chart. Another tells him the dot is in the exact middle. Hal measures the diagonal of the flip chart to determine the center. Hal continues the activity purposely drawing the dot inaccurately. Eventually Hal gets the size right. The moral is to avoid "fuzzy words" and to be clear in communication. He says, "Each company speaks a language all their own. Make sure you communicate in the language they understand".

When Hal teaches on campus, his students represent a number of different companies. Because this class is planned for a particular organization, Hal has customized his material. Hal displays a slide with a photograph of the new Japanese owner Mr. Miagi. Several slides begin with the title, "Mr. Miagi says…" Hal has read Miagi's books and distills the principles of Miagi's philosophy for the students. Hal points out Miagi's philosophy of preferring "passionate enthusiasm to educational degrees". Miagi's philosophy of humility is also emphasized: "everyone should clean a toilet in their career".

Hal continues the lesson now focusing on the ABCs of motivation: antecedents, behaviors, and consequences. He takes this concept from behavioral psychology and distills it down into a simple concept. He shows a series of slides beginning with sleeping in, running late, speeding to work, getting a ticket, talking back to a judge, and meeting "new friends" in jail. This is all done through photos. He uses repetition and humor to make the point very clear. I notice that Hal occasionally lets a curse word slip with this group. Hal knows his audience; a crusty demeanor and salty language appear to increase his credibility with this particular group.

As Hal continues to discuss his concepts, I am drawn away from note taking. I simply sit back and absorb the experience. I enjoy watching him work, picking up on the minute adjustments he makes to suit his material to his students. Toward the end of the class, Hal shows a slide that resonates with me. It reads: *You cannot punish people into excellence.*

At the end of class, Kellie takes over to review the personality profiles she has administered to the students. Hal sinks into his chair. He looks tired. As the students leave, Hal says, "You guys be good". Hal walks up to one student who has been quiet throughout class. He says, "Paul, you let me down. You were quiet". Apparently Paul is the student who had derailed class the week before. As the other students clear the room quickly, the older student in his sixties speaks quietly with Hal. He mentions that he is enjoying the class. As the students exit, Kellie comes back in to speak privately with Hal and to set up appointments for two managers that she wants Hal to mentor.

The room is empty suddenly. Off stage now, Hal relaxes into his chair. He seems to be a slightly different version of himself. Left alone in the classroom, Hal and I pick up the room and reorganize his materials. When we finish, we sit down at the conference table and record our last interview of the project. During this interview, held away from our offices in an impersonal conference room, I am struck by how Hal and I have each changed in the five months of data collection activities. He is used to these interviews. At one point, when I stop the tape because of an interruption, he keeps talking. As I struggle to re-start the voice recorder, I am pleased that these conversations have become natural and interesting for Hal. He has made this process a part of his learning and reflection process.

In my observations, I notice that Hal works extensively with students before and after class. I ask him in particular about the Corner of Hal and Grand and the informal mentoring

sessions he holds there. I ask him to tell me a success story from Hal and Grand. He tells me

there are not any success stories at Hal and Grand.

> You learn about people on Hal and Grand. It's a corner where students go
> to smoke and where I go to smoke. And it's become a corner where non-smoking
> students go to interact. I don't have success stories. I learn about people.

Hal goes on to tell me about a current student who suffered a crisis of confidence. At the

corner of Hal and Grand, Hal told him

> …how good he could be. …He was a bright guy who just didn't have the
> confidence. Quiet. Just hates to say a word in class. He's now talking in class.
> And he aced my final. …I just simply left him a note that told him that he was as
> good as I said he was, and now maybe you'll believe it. And it's just to get his
> confidence up. It's talking to people and telling them how good that they can be.
> Particularly when they don't think they can.

Hal's smoking "rah rah" sessions are a continuation of the informal coaching sessions

Hal held on smoke breaks throughout his career. Hal tells me that he turned down several

promotions because he didn't think he was good enough to do the job. He credits his eventual

promotion to people who saw something in him that he failed to see himself. He says, "And my

job is to see something in other people that perhaps they don't see. To see greatness that they

can't see. To see talent that they can't see".

Zero Desire to Waste Space

That afternoon, on a break before the afternoon class, Hal and I lean against the bed of

his pickup truck, enjoying the cool and sunny weather. Hal is quiet, looking out to the horizon,

smoking his ever-present cigarette. Suddenly he asks me, "If I die or get fired, do you have

enough to finish this thing?" I tell him I do have enough, but he is not allowed to die—ever.

When I tell Hal that he works harder than most people I know, he replies:

> I don't know how to do otherwise. I really don't. I think—my eldest Wes
> asked me, my oldest son, when I was going to retire and my answer was twofold:
> when my boss told me that I was no longer good at it, or competent at it, or when

I die. Whichever comes first. And that's to me the way—that's the way it has to be for me.

Making a connection, I describe Erikson's concept of generativity versus stagnation to him. Hal immediately latches on to the word *stagnation*. "If you're stagnant you're just wasting space. I have zero desire to waste space. Do something with it or get the hell out of the way".

Break time is over. The sun is warm overhead. Hal removes the windbreaker with his name embroidered on it and puts the jacket in his truck. Stubbing out his cigarette, he leads me back into the plant to repeat the class all over again.

Chapter Summary

This chapter provides a holistic portrait of Hal in his role as instructor and consultant using the technique of social science portraiture. Portraiture is a technique that relies on five elements: context, voice, relationships, emergent themes, and aesthetic whole. An important element of portraiture involves the researcher painting his or her self into the portrait; in this chapter I have made my personal relationship with the participant explicit—our relationship is a part of the story.

FINDINGS

Hal B.'s encore career in education has been influenced by a number of factors. The grand tour question of this study is: how have the learning experiences of a retired manufacturing manager shaped his identity and influenced his encore career in education? This chapter focuses on the findings of the study by answering each of six questions that guided the study:

1. What biographical factors influenced Hal's decision to become an educator?

2. What generative factors influenced Hal's decision to become an educator?

3. How does Hal's telling of his life story make meaning of his life and work experiences?

4. How has Hal's life story narrative influenced his encore career in education?

5. What meaning does Hal ascribe to his experience of an encore career?

6. What effect has Hal's life story had on others?

Hal's Stories: The Biographical Factors Influencing Hal's Career as an Educator

As Hal and I have discussed his career and life experiences, a number of stories he has shared have illuminated his decision to become an educator. McAdams's life story model of identity (1988, 1996,) includes key life experiences known as nuclear episodes—scenes that stand out in the life story. Episodes such as high points, low points, and turning points are particularly important in showing the continuity of the self over time. The nuclear scenes that contributed to Hal's decision to teach may be grouped into general biographical periods: Caring Teachers, Early Jobs, Early Career, Later Career, and Retirement. The nuclear episodes that follow are described primarily in Hal's own words.

Caring teachers.

Hal's childhood and youth nuclear experiences involve the intervention of caring teachers. "I'm just full of caring teacher stories," Hal says. The three significant caring teacher stories are story set pieces for Hal—tales that have been told many times.

Mrs. Faith and The Paint.

Hal was raised in the Ouachita Mountains in an isolated and rural part of western Arkansas. He describes the area as "probably 30 to 40 years behind the times. It was very primitive". Hal's earliest memory is:

> living in a three room shotgun house that people today cannot even imagine that my father and my uncle and my grandfather built out of rough-hewn lumber. That means it's straight out of the sawmill. That hasn't been polished. It was a living room in the front, a bedroom in the middle, and the kitchen in the back. Mother and dad had the bedroom. I had a small part of the living room.

Hal remembers a lack of electricity and a lack of running water. As he puts it "School was about four miles away. It was a walk to school typically uphill both ways".

When Hal was in elementary school, the family moved to the larger community of Riverton. Hal describes himself as a young farm boy who was overwhelmed by the differences between his early primitive upbringing and his life in town. Hal's most profound experience of adjusting to town life happened when he was in the second grade through the guidance of a teacher named Mrs. Faith. He tells the story:

> I'm left-handed. And I'm old. When I was in the second grade we had ink wells on our little desks which meant you were writing with real ink. And we used a pen much like a calligrapher's pen is today. And you would dip it in your ink well. And you would write. … And being left-handed, if you grip a pen traditionally—you right-handed people, when you write will hold your hand slightly down. But you write away from the ink. If you are left-handed your hand follows your writing through the ink. ….
>
> And, I, this lovely teacher named Faith started keeping me after school and I thought that was a punishment. God, I thought that was a punishment! And what she did was taught me to write underhanded. And she just didn't teach me to write, she actually made a semi-calligrapher out of me, and she would write—she would write, and I would

copy it. … And she taught me to print like a calligrapher—underhanded. And I remember hating it. I remember hating her because she kept me after school when everybody else was playing ball or out in the woods….

Now why was this a life-changing event? I think that was the question you were asking. Because I carried what she taught me after school. To this day, I print better than just about anyone you'll ever meet.

Mrs. Faith not only taught Hal to write clearly, she also taught him to love reading by introducing him to a book called *The Paint.*

Paint is a type of horse. It's a Pinto. And it was about this little Indian kid. And I happen to be part Indian and all of a sudden I could relate. And I could relate to that paint horse. And I could relate to this little Indian boy. And I remember the drawings and it showed him to be approximately the age I was. …I could be him. And I'm now in a city where there are no horses, and they rode horses as a child in the country. And I had something to relate to. And she opened the world to me. The world was books. …I've been a prolific reader 60 some odd years later because of a teacher who made a difference.

Rebel without a cause.

Hal felt called to teach because of an important early experience with a mentor, high school Principal Earl Worthington. He has told me the story many times, each time giving it a different twist. During our interviews for this project, Hal told the story twice. In the first telling he focused on his adolescent identity crisis:

I started searching for who I was. I'm a product of the 50s. As an adolescent our heroes in the 50s can kind of go back an Audie Murphy type. In the Westerns—he was a war hero—a Roy Rogers, Gene Autry type thing. That's what we started on. But as we became adolescents, the heroes changed. And there was a movie star named James Dean who greased his hair, combed it back in ducks, wore a leather jacket a lot of the times, and a T-shirt. And I chose to emulate him. I kind of gave up on Roy Rogers. … Nobody could figure out who I was. I was a hood, because of the dragster and the motorcycle. Made good grades. Off campus I was a singer. So we didn't know if I was a nerd, a jock. I was also a baseball player. I had no identity.

Unable to drive his "chick magnet" dragster to school, Hal took the bus to school unaware that his principal lived across the street from his bus stop. Hal skipped school frequently

choosing instead to visit the malt shops and pool halls downtown. One day Hal turned toward

downtown. His principal pulled up beside him and motioned for him to get in the car. He says:

> And I was an arrogant, prickish, little juvenile delinquent who if I had stayed on that same path—by the way I carried a switchblade in my boot. We wore things called stomper boots which were black engineer's boots. Carried a switchblade. Took it out on occasion. Brandished it on occasion. Never touched anybody with it. But I wanted the rep of James Dean. And that's what you had to do.

> And he took me to school. Never said a word. And I was arrogant. I was prickish. But I wasn't stupid. And I got out and went to class. And the next day I went to school.

Hal continued to receive rides from the principal. In retrospect he realized that

Worthington was watching him:

> He would wait to come to school to see which direction I was going in. If I went towards school, he would go on to school. If I went toward downtown, he would come pick me up.

Music was the tool that Worthington used to reach Hal:

> And at a moment in time, after several weeks of this foolishness, he made a comment when we got to school. And the comment was, "I hear that you sing". And I've been singing since I was four or five years old.

The premier high school singing group was mixed chorus—an organization that required

students to audition. Hal had a secret; he did not read music.

> To this day, I can't read music. I wasn't about to try out for that because it would have been a humiliation and an embarrassment. And he suggested that I go see the choir director…and try out for mixed chorus. I told him, "I don't try out for shit". And to say that to a principal, will just tell you how arrogant I really was. … And he turned the air blue in that old DeSoto that he had. I didn't know principals talked like that. He scared the pee out of me. Because he wasn't talking to me now, like one of his students; he was talking to me like the little juvenile delinquent that I wanted to be.

> And he told me to basically get my little behind up there and do it right blankety-blank now. And I'm rather arrogant, but again I'm not stupid, and I went to the choir room.

The mixed chorus teacher turned out to be another teacher/mentor. When Hal entered the

room she asked him, "You can't read music, can you?" She asked Hal what songs he knew. Hal

auditioned and joined mixed chorus. Hal credits his experience with mixed chorus for changing

the course of his life. This episode with Mr. Worthington led to his-late-in-life teaching career

and to meeting and marrying his wife, Dixie—the soloist for the singing ensemble. Hal sums up

the experience:

> Totally changed the direction of my life. One principal with a pimply-faced juvenile delinquent, switchblade carrying, ignorant little shit, but a principal saw something that no one else saw. And I asked him—that's the beauty if you have the courage to do it, to go back later. … And I asked him, at a moment in time, "What did you see in that pimply faced little hood who was skipping school?" And he said, "I saw music". And he said, "I've never seen a person"—I'm not sure if this is true today—"that has a love of music, that's all bad".

Later in our conversations, Hal repeated the story of Worthington, this time sharing an

epilogue—a brief story of his friendship with this mentor as an adult:

> Earl put me in a different environment with some different kids, different teachers that made a difference. And ultimately I did graduate from that school, that high school. Ultimately—boy, it was ultimately—about seven years later graduated from college. Spent some time in the army. Came back and Earl and I—he was a singer also—we sang in a barber shop quartet together. We knew each other for a lot of years as adults before he died. When he got ill I went back and asked him how I could pay him back. And he told me the only way I could pay him back was to do what he did. He said, "You can't pay me back". And I agreed that I would do it after I retired.

A tale of two teachers.

When asked to share a negative influence on his life, Hal shared a story of two teachers:

the first a negative influence and the second a redemptive influence.

> The most negative—first—was another teacher at the Big State University. And at that moment in time I stuttered and I stammered rather badly. Could sing but I couldn't talk. I had a speech teacher who humiliated me in front of a group—because we were going to make a traditional three-minute speech. First class of speech class: tell who we were, where we were from, and what we wanted to be we grew up. And because of my stuttering, stammering problem at the end of the three minutes when he rang his bell, I still had not gotten my name out. And he did everything he could do at the end of the …he humiliated me in front of the class. I never forgot that.

Eventually Hal dropped out of the university:

My father came and got me, and his [the teacher's] parting words to me were, "You will never learn to speak, and you will never amount to a thing". That was humiliating in front of my father. You don't do that -- I was only a 17-year-old kid.

Hal has turned this story of early humiliation into a story of redemption and triumph six years later:

I had learned to speak without a stutter or a stammer thanks to another wonderful teacher [at a private university] … I was captain of their debate team, and we beat the Big State University debate team. I reminded him as we left that, "I was that kid that would never learn to speak and we just kicked your team's ass, boss".

The early humiliation at the hands of this instructor appears to have been a motivating factor throughout Hal's life. He even returned to the Big State University to visit the instructor many years later as an adult.

When I got to be a plant manager many, many years later I went back to the university just to see him. It was the year he retired. And I walked in and told him I knew he had no clue who I was, but I was one of his students he said would never learn to speak and I did learn to speak. And would never amount to anything and I was now managing the second-largest plant in the city of Riverton. And told him what a rotten teacher he was. And then left and enjoyed it thoroughly.

He had a -- that was a terrible thing to do to a kid. That influences how I teach today. We don't know what our young people's abilities are going to be. We don't know what their futures are going to be. We have no right to criticize them in that respect. Our job as a teacher is to take them, prepare them, take them as far as we have the ability to do, and without belittling them, without making them feel bad. I find praise works a whole lot better than the other.

Early jobs.

Hal told me several stories of work experiences in his young adulthood that seem to lead to his choice of an encore career. These episodes are not full-blown narratives like the ones that he shared about teachers, but they are nonetheless factors contributing to his teaching career. There are three important episodes: his father's work as a union organizer, his Army experience, and the closure of five manufacturing plants in which he worked.

Father as union organizer.

Hal's goal was to "make a difference in manufacturing". His earliest biographical influence was his father. Hal's father worked in a factory. Hal said that his father "worked in a plant that cried out for a union when he helped organize it. Then the pendulum swung too far. They closed the plant because the union became too strong. So that was my upbringing".

Drill instructor.

Despite an earlier failure at the Big State University, Hal returned to college as a married man and completed a bachelor's degree in religion. Just as Hal was poised to begin his career, he received a draft notice. He "was the last married man in the state to be drafted". Despite the setback to his plans, Hal thrived in the Army. He excelled at boot camp and eventually became a drill instructor.

Hal explained the role of drill instructor:

> Drill instructor is that—his job is not the same as being a leader. A drill instructor is to change a character—is to transform the way people think and to transform people to act as one. Most people, young men in particular, and now young women, when they go into the military they are somewhat free thinkers. They are very individualistic and part of the job of a drill instructor is to put the fear of God in people. When I say jump I want them to say "How high?" on the way up. I don't want them to think about it. And you're doing this not to make them a robot, you're doing this to save their little lives. Because if a command is given and the battle is imminent or the battle is joined. You don't have time to go explain to everybody exactly what you want them to do and then have an election and a democratic process to decide if you're going to do it. They're not, because by the time you do that, they're all dead.

First jobs in manufacturing.

When Hal left the Army he worked in various management jobs. Although he was licensed to teach speech and English, he wanted to break into manufacturing both "to make a difference" and to earn above "starvation wages". Initially Hal had difficulty finding a job in manufacturing because of his college degree. Desperate, Hal decided to lie about his education:

And I went back to the plants, went to the highest paid furniture plant in the city of Riverton, and applied for an hourly job. Told them I had an eighth-grade education and was hired on the spot. Started the next day. Worked for less than two years and got promoted into management by a wonderful owner who took me into his office and told me he thought I was really bright and I needed to go back and get my GED. I didn't have the nerve to tell him I'd lied about my application. And I didn't. And that's how I got into management in manufacturing. They wouldn't hire me with the degree and then once I got the job in management they wanted me to further my education. I always thought that was somewhat ironic. And worked for that plant for a few years and it closed on Friday the 13th. I worked for four more plants in the next seven, eight, nine years that all closed because they weren't making money—primarily closed because management was awful. Management sucked.

Early career.

Hal told me three stories about episodes early in his career that were influential in

shaping his management style and commitment to protecting the people who worked for him.

Each of these stories is an often-told, full-blown narrative.

Learning the art of war.

Hal's success as a plant manager did not come naturally. He learned early lessons about

dealing with people through his dealings with a difficult manager.

Early on I was probably a fairly typical manager. Did my job. Worked hard. Scared to death I was going to be fired. Worked for a vice president whose name was Monty Hunter, and he was the toughest, old-style, "my way or the highway" manager that I have ever met in my entire life. And I was terrified of him. I was—and that's the only word—I was terrified. Every manager at EnergyAir was terrified. When he came to the plant, on to the shop floor fear of him was so great that managers would actually leave their lines and go hide. They would go out to the parking lot. They would go to the restroom. …they would literally hide. He was tough.

And I was just as bad—no. I started to say I was just as bad as they were. I was just as afraid as they were. He scared me to death. But I don't go hide from anybody. That's not my style. And ultimately, since I wouldn't go hide, there would be a confrontation.

Hal's confrontations with Monty were regular occurrences. The manager would find Hal

in his department and create scenes. Hal described the ongoing stress of these scenes as a "fight

or flight mentality". While Hal never hid from Monty or left the plant floor, he eventually had

enough.

> I went home one night and told my wife, that enough is enough. I'm tired of it. And knowing me, I colored the air pretty well with my vocabulary and told her, the war starts tomorrow. … I went back in the next day, and when Monty jumped in the middle of me I jumped back. And we had a horrible confrontation on the floor that lasted about 30 minutes. And from that day on, every day was 20 or 30 minutes of war. And he finally fired me. And I wasn't shocked, I wasn't relieved. I wasn't depressed. When you're angry -- and I had made the decision, you know whatever it takes. I wasn't going to put up with this anymore. And he left. And HR didn't come to get me. And I went to the HR department, and asked if they needed to see me, and they said no. So I went to the cafeteria and drank coffee for an hour or two and nobody came to get me. And lunchtime came, and I had lunch, and nobody came to get me. And after lunch I went back to my department. And nobody came to get me. And I came back to work the next day, and nobody stopped me. And I went to my department, and right on cue, here came Monty. And right on cue, jumped right in the middle of me again. And I jumped right back. … To end the discussion, and in two or three-years—it was an eternity—Monty fired me six times.

Ultimately, the stress affected Hal's health; he suffered a stroke. He described the health

crisis as a turning point.

> I have a period of several days where I have no memory of what went on. None whatsoever. And, they tell me though, that during that period that I have no memory of that I was actually running my department on the phone.

> Monty, my wife told me later, would come up every morning before work. Not come in and see me, but check on how was doing. He would come up every day at lunch, and check on how I was doing. He would come after work, and check on how I was doing. He would never walk in my room, and say, "I hope you get better" or "I hope you die". He would just come and check.

> When I found that out, it sent a message. You don't come and check on someone that you hate. I thought he hated me. I thought it was personal. It wasn't personal with Monty. It was business. All of his yelling and screaming was business. It was never personal. And that, by the way, it changed the philosophy for me also to say, it ought to always be business. It should never, ever be personal.

When Hal recovered from the stroke he returned to work with a new mission.

> How you break a guy? How you get a guy off of you? How do you win? With someone who has positional power? With someone who has vastly more experience than you have? That was probably tougher than I was. But I couldn't put up with the yelling and screaming. And I came up with an idea. And the idea was to do exactly what Monty

said. …We had a machine down in a critical department. Monty lost his temper. Was yelling and screaming and basically said "you ought to fire the supervisor. As a matter of fact you ought to fire the whole damn department".

And I told him, "No problem. I'll fire every damn one of them". And I went and told the foreman very quietly to gather all of his people around his desk and told him no matter what I said, no matter how insane it sounded, to just, you know, have faith, bear with me. He got all the people around. I looked at Jerry and told the people we had more problems we could deal with.

And in the interim Monty was watching, and he came running up to the desk that I was standing on top of, and wanted to know what I was going to do. And I told him I was going to fire every SOB in the department, and I was going to start with the foreman. … Monty, all of a sudden, decided I was really going to do it. I'm a pretty good actor, I guess. And I am very loud when I want to be. That's the drill sergeant that keeps coming back. And at a moment in time, Monty pulled me off the table, the desk, took me to a nearby office, ran the person out …and told me that I can't do crazy things like that. And I told him that if I had listened to him for the past five years instead of fighting with him I probably wouldn't have had a stroke, I would not have been fired six times, and that he had been right all those years and I had been wrong. And I'm going to fire them all. I tried to get out of the office to fire them all and he wouldn't let me out. And what he told me was "Hal, listen to what I mean. Not what I say".

And from that moment until the moment that he retired, which was five years later, he never raised his voice to me. He never made rash, radical, stupid statements. I found his weak point. And his weak point was he said stupid things when he got mad. And I was just crazy enough to make him think I would do those stupid things. I've often wondered what I would have done if he hadn't come and drug me off the desk because I wasn't going to fire those people. I'm not that crazy.

Division director of common sense manufacturing.

Hal identified a second turning point in his career—the moment he learned to step up and

use his voice.

In time I kept getting promoted, and in time, EnergyAir probably made a grievous error in judgment and they made me the plant manager of the Riverton Plant which is the division headquarters. …Our president got all the plant managers together with a consulting group called Willhouse. Most people are familiar with Willhouse as a white goods supplier: refrigerators, freezers, stoves, washing machines, dryers-- that type of white good. And they were big in the 70s and 80s in the white goods business. They also made air conditioners, by the way, which most people don't know. And they also had a very large consulting group. They were well known within our type of manufacturing industry. And our president had hired the Willhouse group to come tell us about something that, at that moment in time, was known as world class manufacturing. I had never heard of world-class manufacturing at that point in my career. I was a two-

year-old plant manager—the junior plant manager of all the EnergyAir plant managers, the youngest one there, least experienced one there.

Hal remembered that as the consultants explained the concepts of world class manufacturing, the approach intuitively made sense to him. He was troubled, however, by some information he had learned about the consulting group.

> After one of the meetings I…did some research on Willhouse and found out that they had built the most modern air-conditioning company, the most automated air-conditioning company. … And the plant never shipped a product. They failed. They went too far with automation and not far enough with people involvement. And shortly after that, because of the capital investment in new plant, they went out of business. They no longer made air-conditioners.

Before the president of Hal's company made his decision about hiring the consulting group, he called all the plant managers together to gain their buy-in to the project. Hal told me he kept waiting for all the leaders around him to step up and lead. Instead he found himself the only voice of opposition.

> I'll be honest with you. I didn't have the nerve to object. I was the youngest plant manager there. The president was a very intimidating guy to me at that moment in time. We went in the next day, which was Friday, and that was when Don was going to announce his decision to the consulting group and he was just forewarning us really. And Don said, "Before I make my decision, announce my decision, does anyone have any questions?"

> And I had one question. And I very sheepishly—remember youngest plant manager, least experienced, scared to death of the president—very sheepishly raised my hand, and I said, "Mr. Fincher, I have only one question for the consultants".

> And he said, "Ask it". And I asked this question: "Were you the guys that consulted on the building and the implementation of the Willhouse plant that closed?"

> And they stuttered and they muttered and they huddled and Mr. Fincher looked at them and said, "Answer his question".

> And they said, yes, they were. And Mr. Fincher said, "Do you have any other questions?"

> And I said, "Just one more. Why should we hire a consulting group that designed a company that failed? I would hire consulting group of someone that put one together that succeeded". And I said, "And the other thing is, everything they said makes absolute

perfect common sense". I said, "It just makes sense to me. But Mr. Fincher, we have made those selfsame suggestions since I've been working here". … And I said, "Nobody will damn well listen to us. You know, we've talked about improving quality. We've talked about improving productivity. We've talked about preventive maintenance. We've talked about supplier partnerships. Nobody will listen. And nobody will do it. And you're willing to pay these guys millions of dollars". And I was terrified while I was saying all this.

The president cut the meeting short and dismissed everyone but Hal. The president

demanded Hal's presence at 6:30 a.m. Saturday morning.

And I went home and told my wife that I was going to get fired at 6:30 the next morning. I went to his office at 6:30 and there sat Mr. Fincher. And I walked in and he said, "Okay, smartass. What have you got to say for yourself?" And I said, "Mr. Fincher, I didn't do that to interrupt your meeting". I said, "It made sense to me". And he said, "It better make damn good sense to you, because you've got three months to learn about world-class manufacturing…And then, you are going to implement world-class manufacturing… since you already know how to do all of this".

Ultimately Hal spent three months visiting companies that used world class

manufacturing then successfully implemented it in his plant.

And then he changed my title, and took away the plant manager title, and gave me a title called Division Director of Common Sense Manufacturing. And we chose—I chose the name common sense manufacturing because we had been through so many flavor-of-the-month programs that had names like world-class or what have you, and again, I just like the term common sense. I thought we could sell it to our hourly people better. They have a lot of common sense, if we are willing to listen.

And that—it wasn't a turning point for me—it was a turning point for the company. Because all of a sudden, this dumb little Arkie was making things work with common sense. And I went from no credibility, and the youngest plant manager in the company to the most credibility of any plant manager in the company because my plant passed every damn one of them. Because we did it. We implemented—we started using the brains of our hourly people, not just the brawn. And ultimately, every plant manager senior to me, ended up reporting to me. And we implemented it in all of their plants. And we were pretty successful at it. So the turning point was I went from youngest, greenest, least experienced, least listened to, because I was the only one that was willing to change. And I wasn't just *willing* to change; I was going to *make it* change.

Hiding his light under a bushel.

Hal discussed one story with me that he identifies as particularly instrumental in helping

him develop his leadership style. He still remembers a dinner with EnergyAir's corporate

president as a pivotal point in his development as a manager.

> Our president at that moment in time was a gentleman named Bob Sullivan who was the epitome of the word gentleman. Nicest man I have ever met in my life. If you had to write the word *gentleman* and then put a photograph at the end of it as a definition, you would put Bob Sullivan's photograph. I thought he was a wonderful, wonderful man. He had become the president of the corporation out of New York. He had come down to, you know, sell EnergyAir and entertain our customers. …He walked up to me in the lobby of the hotel we were staying at and asked if I would like to have dinner with him that evening. And when you're a young plant manager, and the president, your president's president, asks you would you like to have dinner, the politically correct answer is, "of course".

Hal believed that he would be having dinner with Mr. Sullivan at the event EnergyAir

was hosting for clients. Instead Sullivan hailed a cab and took Hal to restaurant on the south side

of Chicago where they were greeted as honored guests.

> Anyway we're having dinner. As we would have dinner, waiters would come up. Older gentlemen. And older—younger than I am now—back then I was a young man. They would come up and say. "Mr. Sullivan, it is so good to see you!" And Mr. Sullivan would jump up and say, "George! Bob! Henry!" Whatever their names were. He knew every single one of them. I lost track of these old men coming up to Mr. Sullivan. Saying, "We have missed you. We're so sorry about your wife".

> And he said, "Hell, I haven't been in here in over 10 years". …

> And I sat there in utter disbelief. Here's a guy who hasn't been to a restaurant for 10 years. The people are coming up to him, greeting him with the greatest of respect, almost like greeting a Mafia Don. And then he's calling each of them by name. … And I was never so impressed with something in my entire life.

Hal learned that Sullivan had singled him out to offer career advice.

> Later that evening Mr. Sullivan got real serious and he said, "Hal, you're going to be a really good plant manager". And I have to tell you, in truth, I retired a very confident, very secure, basically almost pushing, arrogant plant manager. I knew I was I was good. I knew what I had accomplished. But at this moment in time, I wasn't good. I hadn't accomplished a damn thing. I was as insecure as a person could possibly be, if that makes any sense. So how do you go from total insecurity to almost arrogance? By

success. You are successful doing what you want to do. But all the stuff that I wanted to do was thought of as, you know, wrong. Not the way to do it. But I knew I couldn't be what these other guys were.

And Bob, at the right time, said, "You're going to be a good plant manager". He said. "I wouldn't have signed off on you if I didn't think you would". And he had that, he had the ultimate say-so on whether I got the job or not. And he said, "But you have one character flaw".

I thought, "Oh Lord. Here it comes". And I said, "Well, what is it Mr. Sullivan?"

And he said, "You seem to hide your light under a bushel".

And that's a biblical phrase. And I said, "Mr. Sullivan you also hide your light under a bushel".

And he said, "I'm not talking about me, we're talking about you". And he said, "You need to get your light out from under the bushel". He said, "I saw the light. I know how good you can be. I've got more confidence in you than you have got at this moment in time". … what he also said was that "I'm going to retire at the end of this year". He said, "No one knows except you". He said, "I've not made an announcement yet. But I'm not going to be here forever". And he said, "There's going to be a new regime take over and for you to be successful, they need to know who you are".

So his message was, I guess, the more showy. I guess, draw attention to yourself. By the way, he didn't. And my answer to him was this, "You know, I thank you for the evening. It's been one of the best experiences in my life. I'll remember it forever".

That's a long time ago. I have not remembered it forever but for a very long time.

I said, "But I can't do what you ask".

He said, "What do you mean you can't do what I ask?"

And I said, "I can't be a showman. I can't be a showboat. I prefer where my candle is". And I said, "You saw the candle under the bushel and perhaps if the new regime can't see the candle under the bushel, perhaps I'm working for the wrong people".

And he smiled and said, "Perhaps you are right".

And it ended our evening. But it sent a loud message to me. You need to be more outgoing if you want to get ahead. My goal wasn't to get ahead. My goal was to do my damn job. Was to do the best job I could do, so I chose to be what I call a low-profile manager

Late career.

Later in Hal's career, he had the opportunity to turn around a failing plant. In our conversations, Hal called this incident both the high point and the low point of his career. Hal's telling of this narrative is particularly polished and detailed.

Mastering the art of war.

Several years after Hal's promotion to plant manager, he had the opportunity to prove his theories about people management in a new location.

Middleton was a sister plant to the Riverton EnergyAir plant. Sister plant in the sense it was the same size, had a very similar product line. Both of these plants had 2000+ or minus employees in it at a given moment in time. And that was probably five or six years into my tenure as a plant manager. And I had been given the Riverton plant and it was a very successful, very good plant. Actually very easy to run. People were fantastic: great hourly employees, really good salaried employees. And Middleton had been built as a high-speed, high-efficiency, high-profit organization, and due to some really poor mismanagement, really poor management our people down there threw up their hands, elected a union. Productivity went almost in half.

…I had a president… who asked me to his office one day and wanted to know if that stuff that I was always talking about, about people, really worked. And did it really increase productivity and did it really increase profitability?

And I told him, "Yeah, it did". And I said, "Look how well our plant has done here".

He wanted to know if I was familiar with the Middleton plant. And I was, because I had introduced lean [manufacturing] into that plant about five years prior. Lean is a type of manufacturing philosophy. He wanted to know if I would like to prove my little theory about managing people.

I told him, I had already proved it. That we had improved a really good plant.

He said, "No, would you like to go to Middleton?"

And I told him, that plant had failed. And he made me this offer.

He said, "Go to—If you will go to Middleton, we will give you a year and a half to either turn it around—and if you can't turn it around, we'll understand and you can return to Riverton. Or if you can turn it around, then you can either stay, or you can come back to Riverton. But if you can't turn it around a year and a half, we're basically going to close the plant".

Hal decided to relocate his family to Middleton.

In just over 12 months, that plant turned around and became the number one plant in the entire EnergyAir company. And that was cool. We took a failed plant and made it the number one plant in the company. That's a high point. That's hard to replicate. You can't do that twice.

Hal's self-described high point soon became a low point.

We hired a vice president -- the company hired a vice president of manufacturing who was somewhat stereotypical of vice presidents of manufacturing. He decided we would do it his way, not my way. And he decided that I was incompetent, that I did not have the degrees necessary to be an efficient, effective plant manager under his leadership. And the first time we met, he informed me that he would terminate my employment with EnergyAir within a year. I found that shocking, to be honest. The reason I found it shocking wasn't an emotional response on my part. I already had a track record of having put together and held together the most profitable plant that EnergyAir ever had. And I was absolutely stunned, not personally stunned. I was stunned that he would change coaches, change managers when he had one that had the number one plant the company. That was just lunacy to me. I really thought he was joking when he first said it. And found out he wasn't joking a bit.

Ultimately I went to my president and told him he'd hired a maniac. And he told me he didn't hire him, corporate had hired him and he had to use him. And he assured me I wasn't going to lose my job.

I wasn't worried about losing the job, to be honest, because I knew what the corporate policy was. And this guy couldn't fire me without the corporate approval, and I knew corporate wasn't going to approve it. But that meant I was going to have a miserable, low point in my life period.

And I simply went back and told him to give it your best shot, Ace. And gave him a book, and the book is called *The Art of War* by Sun Tzu. And told him he had just declared war. Read the book.

The Art of War had been one of Hal's favorite books since college. He read the book

initially as a martial arts philosophy book; later a chance encounter led him to reinterpret the

book as a business book.

I had a gentleman from General Electric, by the way, who I met at an airport and we were talking about the best manufacturing books we ever read. He mentioned *The Art of War*. I thought he was out of his mind; it's a martial arts book. And he told me it was the best manufacturing book he ever read. I didn't have a copy of it then. I had thrown it away probably. So I went out and bought it and reinterpreted it. Because it's a book -- *The Art of War* is a philosophy book. And my philosophy had been how to do martial

arts. How to go to physical war. And when you read it as a business book all of a sudden it opened up a whole new world to me. It's how you do business. Business is a war. It's an absolute war. Anyway, I went back to my office, got a copy of *The Art of War*. Like today I had eight or 10 different translations of it. Brought him a translation. Threw it on his desk, and told him the war starts now. And it did.

And yes, I really did do that. And he didn't know what to do with me at that point. And we'll make the story very brief: After about a year, he lost the war as I told him he was going to. And he ended up having to go to a charm school in San Diego— which is the perfect place to go to a charm school, I think. And he ended up having to lease an apartment in Middleton for 90 days to find out how my plants were as successful as they were and to find out how I turned around the plant that was on the block to be closed. …And he lost; I won.

When I pressed Hal to explain how he won, he discussed the importance of allies.

If you read *The Art of War*, it tells you step-by-step how to go to war. It just so happened that in corporate there was a gentleman named Sato, who just so happened to have become a friend of mine. He was the shadow manager from the company that owns EnergyAir. He had been the president of the Sumitomo bank in Tokyo. Over a three or four year period, we became friends. …And at a moment in time, the vice president of manufacturing did make a proposal to corporate that they terminate my employment. And it didn't go well. Mr. Sato made several suggestions to him, as I was told by people that were in the meeting. His first suggestion was that he needed to go to Middleton and find out how I had turned it around and put that in his agenda to improve the rest of the plants.

I knew every move he made, because in the book *The Art of War*, it talks about having spies in your enemy's camp. He was obviously my enemy at that point in time. His secretary was a personal friend of mine. I knew what he was going to do before he ever came. When he would leave for Middleton, he would have her make copies of all the things he was going to ask about. I had copies before his plane never landed in Middleton. So I knew every move he was going to make, and if you know what your enemy is going to do beforehand, it gives you a chance to put up whatever defense. A chance to bring up whatever armaments—and in manufacturing's case that's knowledge that you need to have.

So I simply followed the little book called *The Art of War*. And did that. Had spies in his camp. Knew what his moves were going to be. Knew what my moves were going to be. Made darn sure I protected my people. Put an alliance together much like the military does today. And unfortunately, he had no allies. No alliance. Fortunately, I had allies in the highest seats, as well as—and I think that's just as important—in the lowest seats. And if your Army—and my Army was the people that worked for me—if your Army is willing to die for you, to walk through fire for you, it's kind of tough to get rid of you. So I won; he lost.

Ultimately after several years at his new plant, Hal chose to return to the Riverton plant because his vice president of manufacturing nemesis was making decisions that Hal felt were hurting that plant.

> At a moment in time in our career we had a lot of decisions to make. Our Riverton plant, when we were in Middleton, fell on kind of hard times. We messed up as managers again. And the guy who took my place when we went to Middleton just couldn't get along with that vice president I was telling you about and he retired. And my president—as I told you earlier on—told me that if I ever wanted to come back to Riverton –good, bad, or indifferent, whatever happened in Middleton—that I could do so.

> When the plant manager retired, I called my president and said "Ross, I'd like to come home now". And Ross said, "Fine. Call Bob".

> And I called Bob the VP—I won't tell you his last name—and told him I wanted my plant back. He told me no, I couldn't have it back. He'd already hired somebody for it.

> I told him I didn't really care. You know, I want my plant back. This was like four days before Christmas, and I told him I wanted my plant right now. And he said nope. And I said, "Well you can say no, but Willis has already said yes. Capella has already said yes". I said, "So I didn't call to ask your permission. I just called to let you know what the hell was going to happen". And you can imagine that made him rather unhappy.

When Hal shared this story with me, he emphasized the importance of his wife Dixie's role in this decision. The move would cost them "literally, a small fortune". Hal often stressed Dixie's role as his moral compass:

> She said. "Why do you want to go back to Riverton?"

> I said, "Because he's screwing with the people. He's going to put a prick in there that has no idea how to run the business. Has no idea about EnergyAir. Has no care. No feeling for those people in Riverton. And he'll ruin the plant. That's just what will happen".

> And she said, "What do you want to do?"

> And I said, "I want to go back to Riverton".

> She said, "And it's going to cost us X?"

> And I said, "Yep".

And she said, "When do we go?"

And I said, "We're going tomorrow".

And we moved up tomorrow.

After Hal returned to the Riverton plant, it became the most profitable plant in the corporation.

A short retirement.

The final biographical episode that influenced Hal was his short retirement. Within a few months of retirement Hal found himself bored and unfulfilled:

> And at a moment in time I chose to retire. I emphasize that because very few guys at that level get to *choose* to retire; most of us *get* retired. I retired because of a Federal law change in retirement benefits and thousands of guys like me across the nation retired early because we were going to lose a great percentage of our retirement if we didn't. And I chose to retire and stayed retired for four months. Did all my "honey do" jobs that my sweet little wife had put together for me. It was 30 years of stuff I hadn't done, and it took three months to get it done. And all of a sudden I found myself watching *Love of Life* on television and all of those other silly soap operas and hated it. Absolutely despised it.

Eventually as Hal's wife began to urge him to get out of the house, he received a phone call from the chancellor of the State University at-Riverton:

> He called one afternoon and wanted to know how I was enjoying retirement. And Chancellor Stanfield and I were not close friends. We were acquaintances. We had met several times. I told him I was bored to tears. That I hated retirement. And he asked if I would be interested in writing classes and I told him yes. They hired me as a temp to write classes about how, as Stanfield put it, how manufacturing is really done; not how my Ph.D. colleagues teach it's done.

After a short period writing curriculum for a manufacturing technology degree program, Hal was drafted by the Center for Business and Professional Development of the university to begin teaching leadership and manufacturing classes in an associate degree program and to serve as a consultant for local industry.

Summary: Biographical factors.

Several biographical episodes influenced Hal's second career as an instructor at a regional university. These nuclear episodes are the primary biographical scenes that influenced Hal's commitment to his career in education. These biographical nuclear episodes can be grouped into biographical periods: Hal's education, Hal's military service, Hal's early jobs, Hal's work at EnergyAir, and Hal's retirement. The influence of caring teachers, mentors, and even poor managers influenced Hal's commitment to pay back the care he received in his younger days by going into a second career in education.

Making a Difference: Generative Factors Influencing Hal's Second Career

Several years ago, Hal was a participant in a class I taught on Stephen R. Covey's *The 7 Habits of Highly Effective People*. In that class, each participant is asked to draft a personal mission statement. I noticed that unlike the other participants, Hal was not writing. He was not writing in his student guidebook because he does not like marring his books. As others scribbled, Hal was sitting quietly with a small notebook open in front of him. On the page he had written one word in capital letters: MAD. He winked at me and told me that MAD had been his personal mission statement for years. I had forgotten this incident until I began examining transcripts of the interviews between Hal and me. The phrase "make a difference" or "making a difference" is used 73 times.

McAdams's (1988, 1996) life story model of identity includes a generativity script: intent to leave a legacy to future generations. The generativity script inspires actions and decisions in the person's life. Generativity is central to Hal's self-concept; it is fundamentally at the core of who he is. For Hal, the generativity script manifests itself in four ways: a need to "make a difference", a need to protect and give voice to other people, his recognition of others who have behaved in generative ways toward him, and his desire to remain productive.

Hal's MAD mission.

When Hal teaches leadership he stresses the importance of goals. In his life, making a

difference has been the goal.

> If you're going to make a difference—which is what I said the real goal was—just
> to make a difference. It was never to be the best. It was to be the best I could be. It was
> never to attain a position. It was to be the best that I could be at whatever position I
> attained. It said -- it allowed me to make a difference by protecting the people that
> worked for me. And that made a difference in their lives. It made a difference in my life
> too, by the way. It made a huge difference in my life. I can honestly look back now and
> say that for a period of time—for several periods of time in several plants—I made a
> difference not just in the 4000 people that work for me but in the 4000 families that
> worked for me. And that's a hell of a thing to be able to say—that you made a difference
> in 4000 families. I made a difference for people. For education, for families, for
> housing, for churches, for whatever reason. And not many of us are given the
> opportunity to do that.

Hal's sense of generativity as he describes it goes beyond a concern for his own family

and friends. He mentions a need to take care of the people that work for him. He describes this

sense of care in these words:

> I wanted plants that my sons could work in and I would feel safe about their
> welfare. I wanted plants that the women who worked in my plant would be treated as
> well as I would want my wife treated, and I managed to do that. I wanted a plant where
> people could buy a home, pay for their cars, educate their children and I managed to do
> that.

Hal's need to make a difference in the life of others is a motivating factor in his choice of

an encore career in education. When asked why he continues to teach at age of 70 he answered

"It allows me to make a difference". In fact, Hal described his early years teaching as

unfulfilling because he did not immediately see the benefit of his work with students. Hal has

turned the story of his turning point, in fact his high point of the teaching career into another

well-crafted narrative that he shared with me three separate times during our interviews. The

high point was

> the very first time I had a student call me because the low point had been from the
> day that I started until that moment in time. Because in manufacturing, which was my

original background, it's where I spent a career. You create magic almost on a daily basis. And you accomplish something almost on a daily … basis that makes it worthwhile. But education's like a long-term investment and I didn't understand that then. And I guess it was—I had been here four or five years and I had finished a class late one evening. I had gone home. I was in bed. It was one o'clock in the morning. And it was an ex student who I hadn't had for a couple of years, he called me at one in the morning. He worked on second shift. And they had just promoted him to plant manager. And I loved the way they did it. They came out to his shift, promoted him, gave him the promotion that evening just before he went home, and told him that as of the next day he would be the plant manager for the organization. And he called me to thank me at one in the morning. And what thrilled me was he said that I was the second call he made. The first call was to his wife which was entirely appropriate. And the second call was to call me and thank me. … And he called to say Thanks. And it just lit my world up. … I've had a lot of those calls since—but it was the first one. And, and, it, it was for me it was magic. It was magic. It was like "Yes! It, it's worthwhile. Because I was beginning to wonder if this really was worthwhile.

Hal described the feeling of success in teaching as living vicariously through his students' successes. He takes on a student each semester as a "project"—a student that he chooses to mentor informally throughout the semester. His most recent choice of a "project" was a middle-aged female student who expressed an aversion to reading. Hal worked with her throughout the semester encouraging her to read more and linking her success in his class to her reading.

While I characterized this urge to make a difference as a "need" to Hal, he saw it differently:

I don't have a conscious urge to do it. It to me is just what you do. It's not like I am pushed or compelled or inspired to go out and make a difference. It presents itself. Events. People present themselves. … But it's, it's not like I'm driven to do it.

Hal's colleague Kendall described the need to make a difference as fundamental to Hal—perhaps even a reason for living:

I think for Hal if he didn't have that I think that, he would be—he may not even be here. It might literally kill him if he didn't have the connection that he's got through his position here, through his ability to teach, to connect with people. It's very important to him.

Hal echoed Kendall's description by sharing with me that the people he truly admires are the ones that did not stop making a contribution even at an advanced age: "The people that I, I look at historically went at it until they died. Some died young, some died old. But they never stagnated. They kept on making a difference".

It's the people, stupid.

Hal has often spoken to me about personality profiles. Three of the four faculty members in our department administer the DiSC personality profile (Institute for Motivational Living, 2008). Hal, having taken the profile multiple times, is what he describes as "an off-the-charts D"—a personality type that is task-oriented rather than people-oriented. In contrast to his consistent personality profile type, Hal has a concern for the people that worked for him and a concern for his students. "My people," he calls them. This concern and sense of responsibility for others is part of the generativity script that motivates Hal's actions.

Analytical, Hal has codified his concern for people as a management technique that helps him get jobs done. In a recent class conducted on-site at a manufacturing plant in a small, rural town Hal shared anecdotes for motivating people. He calls this lesson the ABCs of Motivating people. In the lesson he takes basic tenets of behavioral psychology and makes them simple to understand—Antecedents, Behaviors, and Consequences. During the lesson, which I observed twice with two different sets of participants, Hal shared stories about his days as a plant manager. He remembers an employee telling him that the best view of EnergyAir was the view of the plant receding in the rear view mirror. Inspired, he said, "We can do better than that". He shared examples of throwing canned soft drinks to people on the shop floor, bringing in popsicles to distribute on hot summer days, and purchasing truckloads of watermelons for his employees. His point: "thank you" means something and makes people feel appreciated. Ultimately Hal sees

treating people well as good business sense. In a draft of an unpublished business book he wrote

in the first years after his retirement, Hal wrote:

> Without a driver the fastest race car in the world will just sit there. The fastest
> race car without a trained driver will crash and burn. It may go three hundred miles per
> hour but it will crash and burn. A race car with a trained, qualified driver will eventually
> win. It is your job to train and motivate your drivers. It may be your job to require that
> the race car be driven in a way and direction that the driver is uncomfortable with at first,
> but it must be done. Achieving this new direction and new method is called leadership.

The book, which he has been inspired to revise after our semester of interviews, is called *It's the*

People Stupid.

It is his ability to bring people together that Hal perceives as his best attribute as a

manager. He says:

> If you put me first—which I think too many of us do—and you make your
> decisions based on me, you can have an adverse impact on your people. But if you put
> your people first and you make a good business decision—that's got to be number one,
> by the way. It can't be my people right or wrong. That cannot happen. You've got to
> make first a good solid business decision and then do what you can best do with that
> business decision to care for your people. And you can find some very unique ways to
> protect your people".

Over the course of five interviews Hal used the word people 271 times. In his book

manuscript he uses the word 227 times. He describes his dedication to people:

> So my job was to make my people better. The argument against that is, well, you
> are extraordinarily selfish, and you know good and well that if you make your people
> better it will make you, so that is the reason you do it. Maybe so. I don't know. I hope
> that wasn't the reason I did it. But either way the result is the same. … So I don't care.
> And the people benefit. The people benefit in the long run. So did I. I'm not stupid. I
> understood, if they were happier, if they were successful, I was going to be happier. And
> I was going to be successful. So I think, to me, that's a win-win. I won. They won.

I've had a lot of help.

When asked about the theme of his life story, Hal replied, "I've had a lot of help". In

addition to the "caring teachers" that are so prominent in his biography, Hal identifies many

other mentors and role models who helped him throughout his life.

On multiple occasions throughout our discussions Hal recognizes the teachers that were

instrumental in his life:

> Teachers. Great teachers. Teachers who found me, figured out who I was, and then figured out how to help and aid me to learn. It wasn't just one. It wasn't all of them either. Some of them sucked. It's just like any other profession in the world. There are great ones, and there are mediocre ones, and there are poor ones. But I was blessed by having more great ones than mediocre ones and poor ones. And it was a group of people that took an interest in a little boy when it wasn't necessary, and helped him transform from a little country … hillbilly into a moderately well rounded person. Without their help, God only knows where I would be.

The pivotal characters in the nuclear episodes he shared with me are Mrs. Faith, the

second-grade teacher who taught him to love books, and Mr. Worthington, the high school

principal that exacted the promise that motivated him to one day teach himself. However, Hal

also shared positive stories about a number of music teachers, the friend who taught him martial

arts in the Korean tradition, and quality guru Edwards Demming.

Hal also recognizes a number of mentors throughout his career. In our interviews he

speaks fondly of a number of mentors including several presidents of his manufacturing

company, a vice president, and even the first foreman for whom he worked in manufacturing.

Hal describes the foreman in his unpublished book manuscript:

> He was the best foreman you ever worked with and what you remembered was that he set the example for his people. He was the first one to come and the last one to go. He knew his job, he made sure his people knew their job, (and several more) and he was quick to praise or help and slow to criticize. To boil it down, he was firm but fair. He believed in the bad apple theory and was quick to begin the process of removing the rotten part of the apple or the apple itself if necessary.

In our conversations Hal spoke almost reverently about his parents, his grandfather, and

his wife Dixie. These core people in his life are the most important of his mentors. In thinking

about these stories, I began to call these three important figures Hal's generativity role models.

Hal describes his mother as a servant leader:

It comes back to Mother. Mother set an example that was unreal. She was one of the quietest leaders I ever met. One of the toughest women. I didn't know she was tough, I just thought she was sweet. But she set an example. And it's now becoming a somewhat popular term—was no term for it back then—but she would be the epitome of the definition of a servant leader.

Hal's father, too, set an example for him. With a fourth-grade education, Hal's father was able to support the family. After World War II, Hal's father moved the family to Riverton to better provide for them and eventually became the commander for the disabled veterans unit in the state.

During our last set of interviews Hal described his family to me. Each summer as a child Hal returned "down home" to the small mountain range several hours south of Riverton to spend summers on his grandfather's land. His grandfather was the patriarch of the family whose permission was necessary before a member of the family could marry. Hal remembers getting his grandfather's blessing to marry his wife Dixie. Generativity in the sense of family is a strong thread in Hal's upbringing which clearly carried over into his work life.

Hal's late wife Dixie is another generativity role model. Hal describes her as a moral compass in his life. He describes her role in his career:

> She was the one who kept me grounded. ... She kept me grounded the whole time. And she by example, by verbalization, made damn sure that I stayed a well-grounded manager. … But she could jerk me up short when I needed jerked up short, when nobody else did. I would listen to her, where I might not listen to other people. She was the only one that I always felt had no agenda. It wasn't—there was nothing in it for her. … she did it because it's what she thought was right. She allowed me to keep on doing what was right.

Summary: Generative factors.

Three generative impulses guided Hal's decision to pursue an encore career in education. These impulses include Hal's urge to "make a difference", Hal's commitment to providing for and caring for "his people", and Hal's respect for a number of generativity role models. Hal's commitment to "making a difference" in the lives of others is a primary motivating factor in his

educational career. As a manager Hal was very concerned with taking care of the people in his employ, particularly developing those people and helping them move up. This concern for taking care of people in his care has been transferred to his care for his students. Finally Hal's desire to give back has been influenced by generative others in his life including several important teachers, mentors, and family members.

Telling Stories: How Hal Makes Meaning of His Life and Work

Hal is a natural story teller. He tells stories in his personal conversations as well as in class. The stories from the early parts of his career have been honed; each story has been told so often that the delivery is polished and sure. Hal easily transitions from the narrative to a relevant point that he is trying to communicate. For Hal the stories are part of learning. Mezirow's (1990, 1991) theory of transformative learning suggests that reflection on life experience is a vital element in the learning process. In Hal's case, reflection on life experience and the framing of that experience in story has been a useful learning tool helping him to accomplish the learning he has needed to move into each phase of his life and career. In addition the storytelling frames Hal's identity. McAdams's (1988, 1996, 2006a) life story model of identity identifies several aspects of personal identity that illuminate how Hal processes his life experiences into a story: imagoes, themes, imagery, and narrative tone.

Hal as a life-long learner.

In making the transition from management to teaching, Hal struggled with learning technology. This struggle to master computer technology provides a lens through which to examine Hal as a life-long learner. Hal's technology struggle exemplifies several characteristics of Hal as a learner: his need for tactile learning, his drive to never stop learning, his competitiveness as a learner, and his habit of finding "gurus" to guide him through new learning experiences. His center director, Jan, says, "Hal's always been a good communicator but I think

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learning to use PowerPoint was a huge challenge for him and one that he's taken on like gangbusters".

Tactile learner.

In the ten years we have worked together Hal has mastered computer skills slowly. While Hal does not pick up new skills quickly, once he has mastered a skill he applies it in depth by diving into a project and deeply questioning every aspect of how something works. Telling Hal how to do something is not effective; Hal must literally touch the keyboard and complete the task himself multiple times to master a new skill. He is a self-described tactile-learner: "By doing it. By touching it. By feeling it. By smelling it. That's my definition of a tactile learner. I have to touch something".

Can't stop learning.

Hal describes himself as a learner: "Because I am incredibly old and there is so much knowledge out there, I can't stop learning. If I quit, the world will pass me by. And I'm still chasing it".

In his drive to learn computer applications, for instance, Hal has never been satisfied with his level of skill. He continues to push the boundaries of what he wants to accomplish. This trait has been fundamental in how he has used learning to move ahead in his manufacturing career as well as his teaching career. Hal attributes his success in management to his ability to continue to learn and to adapt to changing requirements on the job:

> … we should, as individuals, as people, we've got to start learning. But too many people quit. Their education ceases when their formal education is completed. But the world keeps on changing, and the only way we can keep up is to keep on learning. And I see no sense to quit.

Hal recalls seeing colleagues "fall by the wayside" in his career because they failed to continue learning. In fact Hal has tried to persuade former colleagues to teach as well but found they were not interested: "They don't want to continue to learn. They want to stay at the status quo".

When Hal and I discussed his will to keep on learning, I characterized it as a drive. After a substantial pause in which he reflected on my characterization he said:

> I don't know another way to do it. I don't do it because I have this compulsive desire to go out and be this continuous, I'm not a continuous learner by choice. It's not like boy at one moment in time decided I'm going to keep on learning. I've just never made the other choice and said I know it all and therefore I'm going to stop learning or to say that I don't know enough and I'm going to not learn. I just keep finding events that require one of two choices: I'm either going to get really good at it, which has been my nature my whole life, or I'm going to let it go. And I don't know how to let it go. I don't know how not to learn.

Learning as competition.

Recently Hal observed another trainer use a lean factory simulation. Hal was impressed by the demonstration, so he rethought and reworked the successful factory simulation that he uses in his lean manufacturing class. Hal is dedicated to continue learning, but I have observed that a sense of competition is a motivating factor in many of his learning projects. Several years ago I changed many of my presentations to a visual presentation design. In response, Hal purchased several books on the subject and reworked many of his own classroom presentations. By his own admission, he was motivated by "beating" or "catching up" to me.

Hal's director Jan also sees him as very competitive: "Every time he visits a classroom or sees a lean simulation that's good, he wants to better that".

Hal himself cheerfully admits to his competitive streak:

> It's just what I'm paid for. I'm paid to be a supposed expert in several topics and about the time you become an expert someone else develops something new and exciting and I would hate to have someone that had something, could do something that I don't do well. And my DiSC profile, all my profiles say that I seem to be extraordinarily competitive. So if I'm going to be a teacher I should be a pretty good teacher. And the only way you can do that is to learn.

Apparently Hal's competitiveness carries over into his family life. He has told me on many occasions that his wife Dixie often called him "the most competitive SOB I ever met". Hal is quick to point out, however, that he feels he is competing with himself rather than with his colleagues. He says, "I am going to do my very best to win, but I'm not competing with you. I'm not competing with my peers. I'm competing with me. I want to be the best I can be".

Finding gurus.

Hal frequently describes me as his "Microsoft Guru". Hal has had many gurus in his life—informal teachers who he describes as instrumental in the way that he learns. He says, "If you are smart, you figure out who the guru is and you pick the guru's brain".

When Hal begins a learning project he visits every company that has successfully adopted the concept, every person who has expertise on the subject, and reads everything he can find on the topic. He says:

> I've had the best gurus in the world and listened to the smartest people in the world. One of my heroes is a guy named Edwards Deming. And I've been to his conference, a week-long conference twice. Same conference twice. Which tells you I'm not very smart because I didn't get it the first time so I went back the second time. I'm going to pick the brain of everyone I can find that knows something that I don't know which means I'm picking the brain of 99.9% of the people in the world. I'm learning from everybody. And we all should. We all should. I've learned from janitors who worked for me and I've learned from presidents of major corporations. Pick 'em all. Pick 'em all.

Reflecting on life experience.

Hal's wide breadth of life experiences have been a source of learning for him. Mezirow (1991) maintains that it is the act of reflecting on life experience that creates learning. Hal, unaware of Mezirow, spontaneously described this process to me:

> Some experiences are so painful—emotionally, physically, whatever it is—that you have an immediate—it's much like touching something that is burning. Something that's really hot. That's an immediate learning experience. But you can touch something that's really sharp, and it isn't painful at that moment in time. But then you look down at a period of time later and you find out that you are bleeding profusely. And that was not

a painful experience, but it's going to turn out to be a bad experience before it's… Some of the things feel good when they're happening in learning and then you find out later, it's not going to work. It's not going to work. I think you have to sort it out much after the fact—much after the fact.

For Hal reflection on life experience is explicitly linked to his ability as a storyteller. By telling his stories Hal continues to make new connections and to learn from his experiences. For Hal storytelling serves as a form of reflection. Early life experiences have become often-told tales share casually with colleagues or as parables to his students. I notice that more recent experiences when discussed are not the detailed and sophisticated narratives that the earlier life experiences have become. I wonder if these narratives are less formed because Hal has not had the same amount of time to reflect and "sort it out".

Painful life experiences seem to be the source of much reflection for Hal. He says:

I find lifetime learning experiences are very painful. And I find that some of the best learning experiences are some of the worst experiences that we have. And you learn what not to do. And if you can start to categorize what not to do, you make the forward, or the learning experiences to come easier to separate. This falls within the category of a really bad learning experience. If you categorize it you can narrow down and you can actually learn quicker just by process of elimination.

Hal puts this insight to use in his classes. He asks his students to think about the worst boss they ever had. He tells them to learn from the bad bosses, to avoid the mistakes that they made. He says, "If you can eliminate all the bad things that are possible for you to do, there aren't that many good options left. So you just eliminate the bad, and then what's left is going to be pretty good".

I see evidence that Hal uses storytelling to reflect as I watch Hal make new connections and create new stories as we conduct our series of interviews. In the last interview I ask him about the experience of participating in this study. He admits that the experience has allowed him to connect his life experiences in new ways:

It was interesting. I had never linked all those things that we talked about. Your questions were fascinating. And I had told those stories, that thousand stories we told a thousand times and yet I had never put them in sequence. And when you caused that to happen it actually opened my eyes. To me it was a series of separate events that just happened over time and I never linked them. … But I didn't link the childhood and all the other things that went on. I didn't link the learning.

Learning to tie new knowledge to life experience

When I ask Hal how he learns from experience he uses a phrase that resonates with me.

He says, "I've learned to tie life experiences to books, to information that you can gather anywhere". This image of literally tying life experiences together is a metaphor for how Hal makes sense of new information or new experience in the context of his previous life experiences. This metaphor perhaps describes the experience of all adult learners; the learner literally ties new information to what he or she has seen before.

Hal has learned the trick of applying new knowledge to his life. He differentiates between pure academic learning and application. In describing some of his personal learning projects, Hal uses the example of raising horses, a hobby he and his wife Dixie pursued for many years:

> But before I did any of the things I read books—everything I could get my hands on. My wife and I showed horses. I raised horses. I trained horses. I came off a farm. As a young boy all I knew about a horse was how to throw a saddle on it and that was the extent of it. But if you want to raise horses, if you want to show horses, if you want to study bloodlines, if you want to enter a reining event where there are a myriad of different things you've got to make your horse do, I know no better place than to go to the library. I've lived in libraries my whole life long. By the way unlike some of my colleagues here, I didn't *live* in the library. I took the knowledge from the library and went out and lived the *experience*.

Hal's ability to tie knowledge gained from reading to life experience has manifested in many ways throughout his life. He has shared many instances of learning from books with me including racing dirt motorcycles, grooming dogs, cooking, golfing, and—most relevant to his career—implementing lean manufacturing in all of EnergyAir's plants. He attempts to instill this

ability to tie new knowledge to life experience into his students. He describes using storytelling

to help students make these ties:

> And they can relate it to their life experience which many of them have got. A lot of people we teach have some years of life experience. So then they can tie the same story into their life experience and then the recall is going to be clearly superior to just pure data. That A equals B equals C. We, we forget that but we don't forget that you have a fatality because so and so happened or you have a success because something else happened.

Hals's particular talent as a learner seems to be one of his best attributes as a teacher. In

interviewing Hal's colleagues, several mentioned Hal's ability to tie knowledge to life

experience. Peter, the chancellor of State University at Riverton, teaches a special leadership

class every year; he has invited Hal to speak to his students each fall. Peter says:

> One of the things he does is he uses his experiences from the past in his role as a plant manager and high level administrator for EnergyAir as examples for the students about how high level and CEO level people react and interact with others and how their management style or their leadership style affects how they interact with others.

Hal's director Jan also points out this characteristic:

> And yet as he introduces concepts and begins applying those to the real world and to his work experience I think people are just blown away. I think that his applying everything to the real world makes it not only relevant but it increases the importance to the students. They can relate to that and can see how they can fit it into their own work and their own experience.

Hal's former colleague Calvin also brings up this particular ability:

> Every class has something tied in to what they do at work. When he asks for examples from the class he says, "What have you done on this?" and he really puts them on the spot. You know these supervisors aren't just sitting back absorbing information to dump out of their head later. These guys are having to come up and say, "Well, we talked about this and I tried to do some lean things and it didn't work".

Life story as identity.

Hal's life story serves as an example of McAdams's (1988, 1996, 2008) life-story model

of identity. The narrative components of nuclear episodes and a generativity script I have

already addressed in looking at the biographical episodes of Hal's life and his generative

impulses. In this section, I will address four more components of a life story narrative: imagoes, themes, imagery, and narrative tone.

Imagoes.

McAdams (1996) describes imagoes as "little me's". In other words, the imagoes are other possible selves that appear as characters in the life story. Before I knew the term imago I had already recognized this theme in Hal's life story. In a blog entry I wrote months before I began the main research for this study I wrote an entry called *The Many Faces of Hal* in which I identified a number of alter-egos or imagoes including: Hal the Plant Manager, Hal the Country Boy, Hal the Black Belt, Hal the Hood, Hall the Drill Instructor, Hal the Evangelist, Hal the Learner, Hal the Teacher (Voelkel, 2010b). In this early attempt to recognize the imagoes I simply cataloged life roles. In examining Hal's life narrative, four strong archetypal imagoes emerge: Country Boy, Drill Instructor, Reluctant Warrior, and Teacher.

Country Boy.

The Country Boy imago is Hal's characterization of himself as a naïve bumpkin from the hills. This imago is not simply a hillbilly; the country boy represents Hal as a student, the perfect *tabula rosa* on which a series of teachers and mentors worked their magic. When Hal uses this imago I am reminded of the story of *The Sword in the Stone* in which the young, bumbling King Arthur learns to be king through his relationship with his wizard mentor Merlin. This archetypal image occurs again and again throughout Hal's telling of his life story. The country boy imago occurs in Hal's story of Mrs. Faith and learning to love books. The imago occurs with a James Dean twist in his story of the caring principal Mr. Worthington. The imago occurs especially in early stories of his career: "Because all of a sudden, this dumb little Arkie was making things work with common sense. And I went from no credibility and the youngest plant manager in the company to the most credibility…"

The Country Boy persona appears to be not only a narrative device for Hal but a role he takes on when he wants to disarm his audience. Hal admits as much: "I was the leader. And if I get away from all of the country boy—and all of the B.S. that I am so full of…" Hal's director Jan agrees, "He kind of downplays his experience when he comes in. He kind of makes fun of himself. He acts like he's a country bumpkin at times".

Drill Instructor.

The next major imago is Drill Instructor. In Hal's stories the Drill Instructor imago represents the dominant, aggressive aspects of his personality. Hal explains the role of a drill instructor based on his experience in the pre-Vietnam peacetime army:

> Drill instructor is that—his job is not the same as being a leader. A drill instructor is to change a character. Ah, is to transform the way people think and to transform people to act as one. Most people, young men in particular, and now young women, when they go into the military they are somewhat free thinkers they are very individualistic and part of the job of a drill instructor is to put the fear of God in people. When I say jump I want them to say "How high?" on the way up. I don't want them to think about it. And you're doing this not to make them a robot; you're doing this to save their little lives.

In our years working together, Hal and I have used DiSC personality profiles with our classes. Hal tests high on the Dominance scale in this personality profile. Hal frequently acknowledges his competitiveness, decisiveness, aggression, and impatience—all traits associated with the Dominant personality type. From experience Hal has learned to control this aspect of his personality and instead presents himself as a calm, courtly, quiet man. He uses the imago of Drill Instructor to describe himself in those moments when he drops his mask of passivity: "I'm a pretty good actor, I guess. And I am very loud when I want to be. That's the drill sergeant that keeps coming back".

This imago seems to represent Hal in his uncontrolled dominant state. He says:

> I hope -- no I don't hope -- I can be as tough and demanding as you require me to be. It's whatever you are going to require me to be. But you're going to have to require

it. You're going to have to show me that you want a bad ass for a boss. Now if you'll show me that, I'll be your bad ass boss.

Hal's former colleague Calvin describes this aspect of Hal's personality: "He's not a big guy. He's a super nice guy. But you always want to be on the right side of Hal".

Reluctant Warrior.

Another imago that emerges from Hal's life narrative is one I call the Reluctant Warrior. The Reluctant Warrior is a fearful younger Hal that stands up to authority on behalf of others. When Hal uses this imago, I think of the Biblical story of David and Goliath, where young David goes to battle with the giant Goliath. Unlike the other imagoes which I believe Hal consciously uses, Hal seemed unaware of this imago until I brought it to his attention. Throughout our interviews and in our personal conversations, Hal has often told me stories featuring this alter ego. This particular imago shows up throughout his stories of his early career: the story of standing up to difficult manager Monty Hunter, standing up to his president on the issue of world class manufacturing, and his stories of defending "his people" against the hurtful decisions of upper management.

A typical example of this imago shows up in this excerpt from Hal's unpublished book manuscript:

> You find yourself outside in the employee break area. It's neat and clean as always. You think back when it was a mud hole and had trash everywhere.
>
> You think back to when you suggested having it built for the employees. You were told it would cost too much and be too difficult to keep clean. You were told it wouldn't help productivity. You were told no one would appreciate it. You were told the people would eat the leaves off the shrubs and crap on the tables, or at least that's what it sounded like. You persisted, and the new president finally approved it.

Another more dramatic example from Hal's manuscript uses the same imago. In the excerpt Hal describes how he gave a group of hourly employees permission to move elements of the production line to improve productivity only to incur the wrath of the industrial engineers:

When the plant engineer suddenly appeared at your desk you thought he was going to congratulate you also. But, he seemed unhappy. On second thought, he seemed mad as hell. He explained that he had spent years as an IE and that he was president of the state IE Klan. You agreed that he was an IE (Incompetent Engineer). He showed you the line layout. It covered your entire desk. It had little stick people to indicate where they should stand. It had little squares and triangles to show where the equipment and workstations must be. He then showed you his line balancing statistics.

He told you he was a graduate of Sam Houston Institute of Technology. He told you that his mentor at college helped design the Ford's Edsel. He told you that he personally designed this line layout. He told you that he had forgotten more about line layout than you would ever know and you tended to agree with the forgotten part.

His finger kept stabbing the little boxes and triangles on the paper and he kept saying that you couldn't just move stuff. His face got red, then it got redder and redder. He then showed you the work instructions. There must have been fifty pounds of them. You wondered why no one else had ever seen them before. "You've got to put it back. You've got to put it back," he wheezed. "Who gave you the right to move my equipment?" He stuttered.

You tried to explain that the line is finally, after all these years, reaching its goal. He said he didn't care. He said you've got to move it back. He reminded you again that he is an IE. You agreed again. He said he would tell on you if you didn't move it back. You haven't heard that since you were seven years old.

You reached down and gathered up the work instructions and gently dropped them into a fifty-five gallon drum that served as a trashcan. "Oooooooooo", he moaned. You then took his statistics and placed them on top of the work instructions. "Ooooooo"! Only this time an octave higher. You slowly folded his plant layout and deposited it in the same drum. His face looked like he was sucking a lemon but no sounds came out. He walked rapidly away from your area making strange squeaking sounds. Oh well, it was nice working here.

The Teacher.

The final imago Hal uses in his stories is The Teacher. The Teacher characterizes Hal in his new life role as a teacher but through reflection Hal recognizes that he cast himself in the role of teacher years before he actually became an instructor. He says, "I'm a teacher now, not a plant manager. By the way, that's not a huge leap. Most people would think it is. It isn't. As a plant manager, I was a teacher". The teacher imago is the alter ego Hal uses when he talks about current experience both as a college instructor and as in his personal life.

Hals' most characteristic use of The Teacher imago is in the stories he shares about his grandson, a child with Attention Deficit Hyperactivity Disorder (ADHD) and severe vision problems. Hal serves as teacher not only with his students but with his grandson. Hal leaves work at 2:30 p.m. every day possible to pick his grandson up from school and to work with him on his nightly homework. Hal the lifelong learner has immersed himself in research about ADHD children and has attempted various techniques with the boy. The boy's grades have improved, and his school principal regularly consults with Hal about ways to best help the child.

Themes or narrative lines.

The next important concept in McAdams's (1988) life-story model of identity is that of themes or "narrative lines". McAdams maintains that most narrative lines fall into two categories: themes of communion (intimacy) or themes of agency (power). The narrative themes in Hal's life story—specifically in his telling of the nuclear episodes—primarily fall within the category of agency. The major themes are: David versus Goliath, the intervention of a mentor, the mentor in disguise.

David versus Goliath.

The David versus Goliath theme is characterized by Hal casting himself as the underdog—the young, ill-equipped person who must go to battle against more powerful persons. The plot is essentially that of a powerless person gaining power. This theme shows up throughout the nuclear episodes in his life story. In the nuclear episode I called *A Tale of Two Teachers* Hal goes back twice to confront the demeaning speech teacher, each time emotionally representing any other students whom the teacher in question has humiliated. In *Learning the Art of War,* Hal stands up to his aggressive manager on behalf of "his people". The quintessential David and Goliath tale is *Division Director of Common Sense Manufacturing*. This is the episode in which Hal, the youngest, least experienced plant manager stands up to the

company president to prevent the hiring of incompetent consultants. As a result Hal is rewarded

with promotion. Elements of this theme are apparent in almost every story listed as a nuclear

episode.

The David and Goliath theme is apparent in this passage in which Hal describes a

challenge to his authority by a superior. With just a few words Hal sets up the confrontation

between himself as David and the vice president as a Goliath.

> We hired a vice president -- the company hired a vice president of manufacturing
> who was somewhat stereotypical of vice president of manufacturing. And he decided we
> would do it his way. Not my way. And he decided that I was incompetent, that I did not
> have the degrees necessary, to be an efficient, effective plant manager under his
> leadership. And the first time we met he informed me that he would terminate my
> employment with EnergyAir within a year.

Intervention of a mentor.

The Intervention of a Mentor theme is a story of how Hal in his Country Boy imago is led

to a new state of enlightenment or success by a powerful mentor. Like the David and Goliath

theme, this particular narrative line can be construed as a theme about agency or coming to

power. It is also a theme about communion or intimacy with the mentor. This theme is present

in every nuclear episode Hal shared with me: *Mrs. Faith and the Paint, Rebel without a Cause,*

Learning the Art of War, and *Hiding His Light under a Bushel.* An example of this theme occurs

in his discussion with mentor and company president Mr. Sullivan:

> And I said, "Well, what is it Mr. Sullivan?"

> And he said, "You seem to hide your light under a bushel".

> And that's a Biblical phrase. And I said, "Mr. Sullivan you also hide your light
> under a bushel".

> And he said, "I'm not talking about me, we're talking about you". And he said,
> "You need to get your light out from under the bushel". He said, "I saw the light. I know
> how good you can be. I've got more confidence in you than you have got at this moment
> in time". And he said, "I want you…"

What he also said was that, "I'm going to retire at the end of this year". He said, "No one knows except you". He said, "I've not made an announcement yet. But I'm not going to be here forever". And he said, "There's going to be a new regime take over and for you to be successful, they need to know who you are".

Mentor in disguise.

The most unusual narrative theme in Hal's nuclear episode is that of the Mentor in Disguise. In this theme, Hal encounters an enemy who turns out to be a mentor in disguise. This theme emerges multiple times in the nuclear episodes: *Mrs. Faith and the Paint, Rebel without a Cause, Learning the Art of War,* and *Division Director of Common Sense Manufacturing.* The story Hal tells about his disagreeable manager Monty Hunter is a typical example of this theme. In this story Hal "goes to war" with Monty only to discover that Monty cares about him and is teaching him an important lesson. After Hal suffers a debilitating stroke:

> Monty, my wife told me later, would come up every morning before work. Not come in and see me, but check on how I was doing. He would come up every day at lunch, and check on how I was doing. He would come after work, and check on how I was doing. He would never walk in my room, and say, "I hope you get better" or "I hope you die". He would just come and check.

> When I found that out, it sent a message. You don't come and check on someone that you hate. I thought he hated me. I thought it was personal. It wasn't personal with Monty. It was business. All of his yelling and screaming was business. It was never personal. And that, by the way, it changed the philosophy for me also to say, it ought to always be business. It should never, ever be personal.

Imagery.

McAdams (1996) maintains that imagery and metaphor in a life story provide a "distinctive feel" within the narrative; he writes, "Therefore, an individual's favorite metaphors and symbols are reflective of what his or her identity is all about" (p. 308). In telling his life story, Hal uses a number of images: battle and war imagery and imagery for getting ahead in business.

Images of battle.

The primary images used throughout Hal's life story are images of war and battle. In his various interviews and the manuscript of his unpublished book Hal uses the word *war* 55 times, *army* or *armies* 20 times, *fight* 9 times, *battle* 8 times, *enemy* or *enemies* 3 times, *allies* 2 times, and *spy* or *spies* 2 times. Several times, Hal explicitly states "business is a war". He likens knowledge to armaments.

A typical example of Hal's battle imagery follows:

> Had spies in his camp. Knew what his moves were going to be. Knew what my moves were going to be. Made darn sure I protected my people. Put an alliance together much like the military does today. And unfortunately, he had no allies. No alliance. Fortunately, I had allies in the highest seats, as well as, and I think that's just as important, in the lowest seats. And if your Army -- and my Army was the people that worked for me -- if your Army is willing to die for you, to walk through fire for you, it's kind of tough to get rid of you. So I won; he lost.

Although he only uses the image once, Hal also uses an image of another kind of battle— a poker game. He says, "When you're up there, and you're surrounded by about 60 people, and you were -- you know you're running a bluff is what you are doing. You're playing a poker game where all the chips are on the table".

Images for getting ahead.

While Hal consistently uses martial images to describe business, he uses a variety of images when describing business successes. The most striking image is an image Hal uses of managers literally stepping on their employees to get ahead:

> And you've got one of two ways of moving up. You can either step on people, use them as stepladders, and climb up them -- by the way it hurts. Climbing up somebody hurts. If you are the guy getting climbed up, that's painful.

When Hal uses the image again, it is even more vivid: "I have no patience with these little pricks jumping up saying, 'hey look at me!' while they're standing on someone else's neck". Hal uses this image consistently to describe the type of management that he finds distasteful.

The image Hal uses for his preferred management style is much gentler: "Or you can float. Have your people float you up."

Other strong images.

While Hal does not use any other images consistently throughout his life story, a few other images emerge. In remembering the demeanor of his late wife, Hal refers to other plant managers' wives as "Queen Bees" buzzing around and demanding attention. He uses the image in a derogatory sense in contrast to his approval of his own wife's more gracious behavior.

Another animal image is his reference to bosses as chimpanzees: "I call that boss-ship as opposed to leadership. Boss-ship you can treat a---you can train a chimpanzee to be a boss, in my opinion. But you can't train a chimpanzee to be a leader". The monkey or chimpanzee is a favorite image for Hal in his classes. He frequently uses the business analogy of responsibility as a "monkey on your back".

Another vivid image in Hal's life is that of knowledge as an endless tunnel:

> By the way, I fully recognize I'm never going to find the end of this tunnel. When I finally die, I'll probably be reading a book when that happens. Because there is something new out there that I don't know. And I'm going to find out about it.

Hal's image of all the knowledge to be learned as an endless tunnel is an image which resonates with me. In Hal's world, and mine, the idea that there is so much more to be learned is a challenge.

Narrative tone.

Narrative tone is the final life story component that emerges from Hal's telling of the nuclear episodes of his life. McAdams (1996) describes narrative tone as "the overall emotional tone or attitude" of the life story (p. 308). McAdams describes narrative tone using the mythic archetypes of comedy, romance, tragedy, and irony as classified by Northrop Frye (1957).

The mythic archetype most in play in Hal's life story is the archetype of romance. By romance McAdams (1988) and Frye (1957) do not mean romance in the terms of romantic relationships, rather they employ the word *romance* in the terms of adventure. McAdams (1988) describes a romance as "a story in which the hero proceeds on a perilous journey, encounters fierce rivals, and emerges triumphant and exalted in the end" (p. 54).

In Hal's story he presents himself as a person from humble beginnings, who overcame obstacles such as left-handedness, disinterest in reading, rebellion, and a stutter to win the woman he loves and gain and succeed in the position he wants. The stories are told dramatically with Hal casting himself in the David role using his simple tools against more powerful and sophisticated rivals. The elements of romance are in place.

Summary: Narrative as a tool for making meaning.

Hal's telling of his life story is essentially a tool for making meaning of his experiences. The life story narrative has served as a tool for Hal to reflect on and learn from his life experiences. The narrative has allowed Hal to tie his life experiences to new learning so that he can apply his learning to his life and work and help his students learn to tie their experiences to new learning. Another aspect of Hal's life narrative is the way story telling helps create Hal's identity or sense of self. Through the imagoes or alter egos, life themes, imagery, and narrative tone of his life story, Hal is able to build his identity that helps him make meaning of his lived experiences.

Giving Back: How Hal's Life Story Narrative Has Influenced His Encore Career in Education

Hal's telling of his life story has helped him make meaning of his life and career. However, the life narrative also has profound influence on his encore career in education. For Hal, the life story narrative provides his motivation for pursuing and persisting in his educational

career. The narrative also provides the credibility, content and methods, and Hal's philosophy of education that inform his work at the university.

Motivation.

Generativity or a concern for the generation that comes next has been a component that has emerged throughout Hal's telling of his life story. This sense of generativity is a primary source of motivation for Hal. Generativity provided the motivation for Hal to enter into his second career and continues to provide the motivation for his ongoing commitment to this career.

The most significant motivating episodes in Hal's life story are his "caring teacher" stories. In the story of *Mrs. Faith and the Paint*, Hal points out how the difference that one teacher can make by citing Mrs. Faith's impact on his life nearly 60 years later. In *Tale of Two Teachers* Hal shares how a teacher can have a significant negative impact as well as significant positive impact. *Rebel without a Cause* is perhaps the most significant story; in this tale Hal is "saved" from the wrong path by high school principal Earl Worthington. Later as an adult, Hal becomes friends with Worthington and asks how he can make it up to him. Worthington asks him to teach others. Hal says:

> He told me the only way I could pay him back was to do what he did. He said you can't pay me back. And I agreed that I would do it after I retired. I thought I was going to do it in high school. That's where I planned on doing it. But I've got several friends who were teachers, real teachers. I'm a—not a real teacher. And they told me that in high school I probably was going to have trouble doing what I wanted to do. I'm not sure now in retrospect, ten years later that—if I—I think I would have had trouble. I think I would have had some people that would have been difficult to have dealt with. In retrospect, I probably should have gone on to high school.

During one of our interviews I asked Hal why he continues to teach more than 10 years later. He said, "Because I get a lot more out of it than my students do. I get a kick out of it. In truth, and it sounds so immodest, frankly I hate to verbalize it, I can make a difference".

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Content and method.

Hal's storytelling ability is both a method that he uses in his classes and consulting as well as a source of content. By creating stories based on his life experiences, Hal is attempting to enhance recall for his students. He explains his methods in two ways: speaking the language of the student and enhancing recall.

The ability to communicate clearly on the student's level is important to Hal. He says:

> You learn from the best because—what we were talking about earlier—I learn from painful experiences that most people that teach computer skills… actually most of them aren't all that darn good. In doing, let alone teaching. They do a horrible job teaching because of their communication skills. Their explanation skills are so bad. And that to me tells me that if I want to be successful as a teacher I don't want to teach the student how to speak my language unless it is a foreign language I want to speak the language of the student and then allow them then to translate it because if I can teach them how to do it they will ultimately figure out the correct language to use.

Hal openly talks to me about how he shapes his life experiences into stories for classroom use. He tells me his own experiences of being bored in classes and forgetting "90%" of what the teacher had just said before he got back to his car. He says:

> I try to do two things with the stories. I, I tell some ugly stories, some stories about really bad people and they have a, an amount of just sheer shock value. You tell stories of shooting and of people that die and people that get hurt if you're doing a safety class. But they've got to be real stories. And I do something else with them, is I try to make them laugh with a lot of the stories. You tell a true story. And then if you have the ability and God seems to have given me that ability on occasion where you can make them laugh. They'll remember it past the parking lot. And they'll forget the data. They will forget the point of the story. But then what will happen in their working career or before a test for that matter, they will remember the story but they won't remember the data. And then once they recall the story, and then the story will then cause another recall of data or fact. And it's more interesting.

Hal admits to using dramatic license in telling the stories; humor and respect for his students are important elements. He describes using his wife Dixie as the "heroine" of his stories and casting himself as "the bad guy" or "the dumb guy".

> And to do this, I think, to do it effectively that you have to do what I call self-depreciating humor. It's ok to make fun of me. You can never make fun of a student.

You can never tell a story that belittles a student. And that's where I use the dramatic license. I'll put me in that place in that part many times. Where the story did occur, but I'll put me in it because now they'll say, "Ha, Ha! He really screwed something up".

Recently I observed Hal teaching the same class twice in the same day. The class topic—The ABCs of Motivation—focused on basic behavioral psychology principles as applied to the workplace. During this class he shares a story about throwing Dr. Peppers to employees on the shop floor. In the first telling during a morning class the story seemed to arise spontaneously. He offers throwing Dr. Peppers as a way he used to lighten the atmosphere and provide casual rewards at work. The first telling is bare bones. Hal's office is above the shop floor. He goes downstairs to reach the vending machine and receives two Dr. Peppers accidentally. A worker nearby says, "I sure would like a Dr. Pepper" and Hal throws the extra soft drink to him. This is the beginning of a tradition in which Hal buys Dr. Peppers and throws them to the workers on the floor.

I am fascinated by the differences in the story between the telling in the morning class and in the afternoon class. When Hal tells the story again to a second group, there are more details. He describes the heat of the day. We learn the price of the soft drink. We learn the name of man who wishes for a Dr. Pepper and his history as a worker. As Hal describes the daily tradition, he pantomimes throwing the soft drink cans to the imaginary workers.

Hal's colleagues speak of the effectiveness of his story telling technique. Former colleague Calvin says:

> And the thing that was brilliant about him with the motivation and stuff was he was kind of like the Mark Twain of storytelling. He would go in and tell stories that would really interest you and then at the end you would learn there was a very significant lesson and remember it. Even students would come back later and say, "Hey, you remember that story that Hal taught, uh talked about? You know I actually changed something I did on the job related to that".

Hal's director Jan agrees:

> I think that his applying everything to the real world makes it not only relevant but, increases the importance to the students. They can relate to that and they can see how they can fit it into their own work and their own experience.

Another of Hal's colleagues, Kendall, also speaks of Hal's ability as a storyteller:

> He's got very practical, hands-on experience and that allows him, when whether it's teaching or leading a conference breakout session, whatever, it allows him to make connections that are very real, rather than superficial or textbook with the people that are in his audiences as well as the people that are on panels with him. In creating that bond he's got a tremendous amount of credibility and as he tells his stories because he's a storytelling type instructor, uh, he is able to demonstrate character and competence that transcends any gaps that may have existed before he started.

Credibility.

As Hal's colleague Kendall mentions, Hal's narrative of his life story provides him with credibility; this credibility allows him to make an impact that some other instructors cannot. Hal's years of experience as well as his wide breadth of experience give him a voice that students take seriously. He says laughing, "You have got to live a long time. …Because if—I have seen younger guys try to teach with that technique and if your audience doesn't believe that you really did it you lose the audience if that makes sense".

When I speak with Hal about his credibility he laughs. He attributes his credibility to his age, but his colleagues see this credibility as an important attribute he brings to the university. Hal's chancellor Peter says:

> I think that it gives him great credibility that he has this outside experience as well as the internal uh—what would you call it? The internal uh or the educational uh stamp of approval for his ability to be a professor or teacher or trainer or whatever.

Peter also speaks to Hal's personal integrity which he sees as part of Hal's credibility:

> …if you tell people what they don't want to hear –they hire you and then you tell them what they don't want to hear –sometimes they don't like that. Because they really have hired you, they've hired you with a predetermined outcome that they want you to simply verify since they can't be a prophet in their own land. And he's [Hal] probably, he's not going to do that.

Jan, Hal's director, agrees:

> And you know we sound ooey gooey when we talk about him but he's earned that. He was very successful in business. When he was at a company today, he had someone who had worked for him in the past telling his current managers about how successful Hal had been implementing lean processes at work. He really earned respect in the workplace and I think he's brought that into the classroom and his students are the recipient of it.

Kendall, Hal's colleague, stresses Hal's ability to speak the language of clients and

students:

> …he really understands whatever he's talking about when it comes to manufacturing. … He's fully versed in that language and so he's got instant credibility with people that come to us from those environments. He's equally credible with people that are more white collar type jobs and that's because they usually know enough about the subject to know that he's not B.S.ing, that he's really speaking from what he really knows and it's, it's something that's concrete, that's tested and has been successful for him or that he's tested it and it was a bad thing to do so he can speak from "this failed in my experience. So that's probably not a good route for you to take".

Calvin, Hal's former colleague, sees the situation more simply. He believes Hal relates

to the students because he has been in the same situation they are in. He says:

> And with our Workforce Leadership guys we had a lot of supervisors that—they had a hesitancy in a traditional academic environment—uh, they had trust issues. But with Hal they totally trusted him because he had been through some of the same things. He even started out as a supervisor so he saw some of the same things.

Philosophy.

Hal's telling of his life story illustrates his philosophy of education. Hal's philosophy

can be linked directly to a biographical episode, the nuclear episode I named *A Tale of Two*

Teachers. In this episode, Hals describes his humiliation at the hands of a speech teacher

because of a stutter. Reflecting on the experience, he says:

> He had a -- that was a terrible thing to do to a kid. That influences how I teach today. We don't know what our young people's abilities are going to be. We don't know what their futures are going to be. We have no right to criticize them in that respect. Our job as a teacher is to take them, prepare them, take them as far as we have the ability to do—and without belittling them, without making them feel bad.

Hal equates his philosophy of leadership with teaching. He believes to be a good teacher is to be a good leader. His philosophy of leadership he has adopted from Sun Tsu's *The Art of War*:

> It's my—it's the book of leadership, one of, that I've tried to follow. And it works. It says you've got to be tough. But tough doesn't mean *mean*. It means the opposite in many, many cases. You don't want your people to necessarily love you, but you want them to respect you. They won't follow you, if they don't respect you. And it's about getting people to go in your direction, because they want to. Not because they have to.

In a later interview, Hal puts it more simply: "But I think the great teachers that I have experienced in a lot of years were people who had the ability to convince you that it was in your best interest to learn".

Hal has recently been promoted. During the promotion process he produced a portfolio in which he was asked about his teaching philosophy. In our conversations, he reminds me of that portfolio entry. He says:

> It was you meet the student where he is. I'm a huge believer in that. Not where we wish they were. I hear too, too many—and I'm distressed to a degree with it. You know I wish my students were better prepared. I wish. But wishing it won't help them. Wishing that they were better prepared will not help prepare them. So to me it says you find out where your student is. You reach out and you bring them, you pull them, you coach them as far as you can possibly take them. You don't bemoan the fact that "I wish he/she was better". You take it as an opportunity, a challenge, to make them better.

Summary: Narrative influence on Hal's encore career

Hal's life story narrative has influenced Hal's encore career in education in a number of ways. First, the meaningful nuclear episodes Hal tells are the motivation for Hal's entry into his educational career as well as his motivation to continue teaching after more than ten years. Hal's story telling also provides the content and methodology for Hal's teaching career. His own experiences are fodder for lecture and discussion; his extensive experience allows him to use storytelling, simulation, lecture, and discussion as methods to help his students learn. Hal's

narrative is also a source of credibility for him. His storytelling and his authentic experience provide credibility for Hal in his roles as instructor, consultant, and mentor. Finally, Hal's telling of his life story is a rich source for his philosophy of education.

Making Meaning: The Meaning Hal Ascribes to His Encore Career

By telling his life story Hal has been able to reflect on the meaning of his second career in education. McAdams (1988) maintains that each life story has an ideological setting—a series of values and beliefs that are at the core of the story. For Hal, as I discussed earlier in dealing with generativity script, the need to make a difference is paramount. The overall meaning Hal ascribed to his second career is the ability it gives him to make a difference in the lives of others. However, there are other values at work in his life story that illuminate the choices Hal has made in his educational career.

Ideological setting.

Hal states his value system clearly in his unpublished book manuscript: "It is such a simple formula for success. Do the right thing. Make sound and moral business decisions. Put people first. Customers, Employees, and Owners <u>really</u> are just people. Morality makes money". In conversations with me, he tells me the philosophy handed down from his grandfather: "You don't lie, you don't cheat, and you don't steal".

Faith also plays a part in Hal's ideology. As an undergraduate Hal majored in Theology. When I ask him what he values, Hal says:

> Honesty. Integrity. That's about all I value. Family. Family, with me, will come second always. God comes first. Family comes second. See I put something in grandpa didn't have. I wish he had of, but he didn't. But it's God, family, everything else is second. Everything else third. Those thirds though, come out to the thing of doing what's right. Not doing what's correct. That's two different things. Correct and right are totally, totally different things. Playing by the rules is not always the right thing to do.

Three other elements of Hal's personal ideology are important because of how they illuminate his career as an educator: the philosophy of treating other people the way you wish to be treated, the importance of humility, and the necessity of change.

Do unto others.

Hal has a handout that he likes to include in the materials for the classes that he teaches. It is a simple one-page handout that lists a single philosophy as it is worded in a number of different faiths: Do unto others as you would have them do unto you. This is a philosophy that Hal believes in; it is the focus of the unpublished book manuscript that he wrote when he first retired. Hal says:

> I can make it work anywhere in the world. Everyone writes about it. From Baptists to atheists, from Buddhists to wherever we choose to go, it's out there. It's out there. So what that says, because whether you're religious or anti-religious, there is still a faith. And they all espouse treating people the way you would like to be treated. I just think it's a neat book. I prefer the old—I prefer the Christian Bible. That's my preference. That's where my beliefs are. But I will not put myself in a position to say ok I'm the only one that's right. I believe I am, but most of the world doesn't believe I am. But most of the world has "treat people the way you would like to be treated". So. I think it's a nice concept. And it works, by the way.

Hiding his light under a bushel.

A second philosophy that Hal lives by also comes from his Christian faith. In his story of meeting with his company president, Hal shares the story of Mr. Sullivan who advises him to stop "hiding his light under a bushel". For Hal, this phrase seems be a synonym for humility, for not advertising strength or position, for not publishing his accomplishments.

In my research journal, I wrote a passage that seems to illustrate Hal's reluctance to allow his "light to shine". In March, the office planned a small celebration for Hal on the occasion of his promotion. That afternoon I wrote:

> Hal can't stand to be the center of attention. He came in this morning with a rose for each of the women in the office carefully chosen to reflect personalities. Jan's is

peach and white with baby's breath. Mine is a vivid orange with small purple flowers accompanying. Just like him to deflect attention away from himself and on to others.

Hal puts it differently: "My goal wasn't to get ahead. My goal was to do my damn job. Was to do the best job I could do, so I chose to be what I call a low-profile manager". Another statement Hal made to me in our interviews is perhaps more subtle:

> As, as—if you are a leader, if you are a boss, if you are a black belt master you don't have to go tell people that you are the boss, you don't have to tell them that you are a black belt master, you show them by your actions.

In other words, Hal wants to be recognized for his actions not for his position or political standing. In the same interview, Hal expanded on his original statement:

> Oh, I attained a position, plant manager—that's in some people's eyes is a rather powerful, kind of a high position in, in, in some companies. But you don't have to tell people you're a plant manager. You don't have to wear a badge that says Hal, Plant Manager on it. I wore a badge that said Hal. People knew who I was. I didn't have to announce to people that I was a plant manager. I didn't have to dress a certain way to let them know that I was management, that I was, had a greater position than they did. I didn't have to yell at them, most of them, to get the point across.

Change or die.

In our interviews, Hal shared with me that he appreciated his company EnergyAir because they gave him the opportunity to manage his own way: "Most companies don't do that. The larger the Corporation, the more rigid it becomes, the more rules they have. And it's my very strong belief that rules repress change. If you can't change, you can't get better".

Change is an important concept for Hal. He attributes his success in a long manufacturing career to his ability to change along with the business environment. He says:

> And the changes to me have been phenomenal. Everybody bitches about change. I don't like some of it, but most of the change has been for the positive. It's probably why I'm, was known, when I used to work for a living, as a change agent. I want to change. I want to see things get better. I want to see people prosper. And they only prosper when we change. They fail if we fail to change.

Hal tells me that his biggest challenge as a teacher is:

convincing the younger students that change is inevitable. That what they did yesterday both for the young ones and the old ones by the way, that what they did yesterday won't get them ahead tomorrow. We all think, particularly college students, that we get our degree and we go out and we're going to whip the world and that's all we need. And they really haven't recognized that that's just the first step that they needed. And that if they work for a traditional work span that what got them into whatever they get into—it doesn't have to be just manufacturing—whatever they are learning— whatever their area of expertise is—that what they are going to learn today is just another stepping stone. So my task, I think all of our tasks, is to say that this is going to get you through the year. This may get you through next year. But you've got to keep on preparing. And you've got to keep on changing. Or in today's environment you will be obsolete long before you retire.

Summary: Meaning Hal ascribes to his encore career

Hal's career in education is the culmination of his life-long drive to "make a difference" in the lives of others. His personal value system and beliefs provide the ideological setting in his life narrative. The career is also a way for Hal to make clear the three tenets of his personal code of beliefs: treat others the way you would like to be treated, act with humility, and be prepared to change or cease to exist. Hal's encore career is a way for him to put his beliefs into action.

Touching Lives: The Effect of Hal's Life Story on Others

The effectiveness of Hal's life story may best be examined by investigating his effect on his audiences. I chose to study Hal because of the impact he has had on me as my colleague. Hal's extensive breadth of life experience, his ability to learn from and cultivate wisdom from his experiences, and his impressive ability as a story teller have served as sources of inspiration for me. I have witnessed his effectiveness with his students and have borrowed from his techniques over the years. The study of Hal's life story narrative cannot be complete without considering the effect he has on colleagues, on students, and on the institution he serves.

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Relationships with colleagues.

To determine Hal's effect on his colleagues I interviewed four key people who have extensive experience working with Hal: the chancellor of the university Peter, Hal's director Jan, Hal's former teaching colleague Calvin, and Hal's current teaching colleague Kendall.

Hal has developed strong relationships with his colleagues. The most formal relationship is his bond with the university chancellor Peter. For the past several years Peter has invited Hal to speak to his chancellor's leadership council, a group of hand-selected scholarship students that Peter teaches each semester. Every fall, Peter invites Hal to attend his leadership council retreat where Hal administers personality profiles and sets the stage for the students' experience of the class. When I ask Peter about Hal's defining characteristics he says:

> I think that his own objective reality about himself and the fact that he doesn't have any false illusions about what he knows or what he doesn't know. So he's very secure in himself and if he's teaching it and he's teaching it because he knows it he's confident that he knows it. And if he doesn't, you know if it's an experience that he's intuiting he'll tell you that this is just my perspective I've not been in that situation but this is what I think I would do or how I think I would want it to go. But I don't have the particular experience so I –you also and just the fact that he's very straightforward and kind of—not an official term but a no B.S. kind of guy.

Jan, Hal's director, has a closer, more personal relationship with Hal. She says:

> It's a very professional yet fun experience. Hal approaches everything very professionally yet when you get to know him (laughs) he's a doll. I guess I shouldn't say those things…. But he is a doll. I think that he is just a wonderful resource. It's interesting to listen to his stories but you really learn from his stories, and I appreciate him.

Calvin, Hal's former colleague, is an engineer who has worked closely with Hal, even team-teaching some classes with him before Calvin left the university in 2002. Calvin keeps in regular touch with Hal while serving as an adjunct instructor for the university. Calvin's admiration of Hal is evident in this description of how Hal uses his martial arts experience in consulting:

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I can't remember if it was judo or aikido one of those that you use someone else's inertia to move them in the right direction. And he is brilliant at that. It's neat to sit in meetings we've gone and talk to executives in the community. People that are—uh, they have a pretty good sized ego. And the thing that's brilliant about Hal is if these guys come in with an attack he can kind of twist that just barely not ruffle their feathers and actually get them going in the right direction. I mean it's absolutely brilliant to see.

Kendall is a current teaching colleague of Hal's who has team-taught with him and worked with him for nearly five years. While Kendall's relationship with Hal is more collegial than personal, she says, "Hal is very endearing to be around. He's a very personable person". When I asked her to describe Hal's general characteristics, she said: "…he's very smart, very opinionated, and a story teller who will tell you a story a dozen times to make his point if that's what he needs to do. So a grandpa storyteller who does it in a classroom".

Benefits to the institution.

Hal's colleagues were able to give me examples of how Hal's career in education has provided benefits to the university. Kendall is the colleague that seems to be least influenced by her personal relationship with Hal when describing his benefit to the institution. She sees Hal's experience as a key benefit to the university:

> The benefit that I see—and I saw it when I interviewed for a job here—is that in many university settings the academics have no real-world experience and I don't, I don't mean that in a derogatory sense—they just don't. So their …image of the world is through academia and very little of it has been tested or practiced. They've got no practical application for what it is or for what they are a distinguished expert in. Hal, on the other hand, brought—I think brought because I see it now—he brings that different component of somebody who isn't just walking—he's walking the talk.

Kendall also points out that Hal can teach but he also has the ability to still run an actual manufacturing line. She sees this ability as "connectivity" between the world of academia and the world of work.

Peter, the university chancellor, sees Hal's experience in the "for profit world" and his perspective as an outsider to the public sector as a benefit to the institution:

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Well I think any time that you hire people who have outside experience you have—I hesitate to call it real-world experience. I mean because I think that what we do here is real-world. But that has experience with a for-profit environment.

…There are different bottom-lines for a profit company than for a non-profit company. There are different expectations. There are different constituencies and I think when you bring someone in from that arena into the educational enterprise it creates— they bring in a different way of viewing the world. And I think that is very important.

Jan, Hal's director, agrees with the chancellor that Hal's perspective—she calls it a "real-world" perspective—is valuable for the university community as a counterpoint to more traditional academic thought. As the director of the business outreach training and consulting group, Jan also sees a more practical benefit. Hal is instrumental in helping recruit business and industry to the region:

He can really relate to where those companies are coming from, what they're looking for in their workers, what they expect in training or what they expect from their workforce in general. Because Hal has actually done all those things in our area he brings credibility to these discussions.

Jan credits Hal's work as a major factor in the recruitment of four major employers to the Riverton and the surrounding communities. She says:

After those companies come to town they want Hal to come and help them with their workforce. Set up their processes and procedures, and train their people. So he has really made an impression on them. A very positive impression. And I think that then those companies will be great supporters of the university. Because they feel like we are here to support them. We are here to help them meet the needs they have whether in workforce development or looking for graduates.

Calvin agrees that Hal's work with businesses helps those business leaders develop a positive impression of the university:

There's a lot of companies here in town, that because of the work Hal's done, uh, have a very favorable view of the entire university over all. He's kind of like—gosh! An emissary for the university. He goes out there and a lot of these manufacturers that tend to not engage with the university very much, after they work with him they're thinking about what Hal's done for them but they, they blanket look at the university and [say]"Wow, the university is doing some great things. They helped me personally". And then they start sending their people to classes. Not just Workforce Leadership but other classes.

Benefits to the students.

While Hal's colleagues see Hal's teaching career as a benefit to the institution, they also

see benefits directly to the students with whom he works. Jan sees Hal's ability to bring applied

learning to the classroom as his true benefit to students:

> You know rather than taking something from a textbook and teaching that, he
> brings his experiences to the classroom and he's lived all those things that we're talking
> about. He never teaches a subject without relating it to where those students are. He gets
> to know his students … and he not only knows a little bit about them personally but he
> knows about their work experiences. Not only does he tell stories about what he has
> done and experiences he's had in his life or experiences he's seen in all the years he's
> spent in manufacturing and in industry but he brings that out of his students too, you
> know, "How have you addressed that?" "How have you seen that?" I don't think anybody
> ever leaves his classroom not feeling that what they have learned is applicable to the real
> world.

Beyond Hal's ability to teach practical skills, Jan points out his ability to help students

grow in all aspects of their lives. Jan relates a story about Hal's work with a cohort of students

from a community approximately two hours from Riverton:

> There were just wonderful experiences there. We had a couple of ladies that
> came into those classes that were afraid of their shadow. The first day of class Hal has
> everyone introduce themselves and tell just a little bit about themselves and where they
> work. They were petrified. They were shaking. I was there that day and it was like they
> were scared to even do that. … Both of them changed dramatically. But one of them in
> particular--after about, I think it was 16 weeks that the class lasted—right before they had
> a graduation ceremony, she was interviewed by the local radio station. She was just
> glowing and praising what happened in the class and the experience and how it changed
> her. Her boss came to the graduation ceremony and he said it was just amazing what
> Hal's class had done for her in her work experience I think that happens over and over
> and over.

Peter, the university chancellor, sees benefit to students in Hal's experience in the

workplace and his knowledge of various leadership styles. Peter says:

> In terms of what he brings to the students, I think that he brings a certain level of
> perspective and insight. He helps them with some insight about me and what my
> expectations are of them and how my expectations could very well be different than the
> expectations of other kinds of professors.

Calvin believes that Hal has an ability to help students realize they can accomplish more

than they believed possible:

> Sometimes I would get students he had had in a previous class and the benefits they have is it opens their eyes, they understand the concepts for the first time ever. Instead of it being pure theory they go through his classes they try this stuff out and their benefit is all of a sudden they understand how to make improvements in the company. … Suddenly these people realize, "Hey, I'm the person that can change things at my company".

Kendall has a slightly different opinion than Hal's other colleagues. She appreciates

Hal's experience and ability to make connections with others. She seems to see Hal's non-

traditional approach as a negative although she praises his effectiveness:

> [He is] maybe not as disciplined and I mean like in um teaching methods because the teaching that Hal has done that I've seen it's more of a coach and mentor more of a, not a big buddy, but it's a big buddy that walks you through the lessons rather than the traditional methods for teaching—you know in this day and age a lot of people are trying to move from those old tradition things. So the textbook and chapter reading, weekly lessons, and regular testing that kind of stuff, he's not, he's structured in that regard in his classroom, but that doesn't mean he's not effective. It's just completely different.

Jan, in contrast, agrees that Hal's methods are not necessarily traditional, but she sees his

unconventional methods as a positive not a negative:

> He had a student who was scared to death to talk in class, so he gave her the responsibility of telling him when it was break time. That sounds crazy but she got to doing that and it gave her some confidence that she controlled something. If she didn't tell him it was break time, the class didn't get a break. She had to speak up. That was just the beginning of a change in her life.

Such mentoring episodes, while not fitting the traditional model of academic course delivery,

are, to Jan, an important benefit for students.

Negative effects for institution and students.

Because Hal is my friend, I was careful to invite negative perceptions of him and his

effects on the university as a whole and on students. Jan struggled to provide me with negative

examples, although she scrupulously discussed a number of incidents with me only to decide that

they were in fact positives. She said, "You know that's really difficult for me to answer and uh, because of how I feel about him". Peter, the chancellor, laughed when I asked about negatives: "I'm sure it's hard to find anybody to say anything bad about Hal".

Peter offers a differing perspective about hiring retired executives in general:

> I think the risk is that people come in from the outside world with a whole set of, uh, uh of experiences. From a different kind of world. From a for-profit world. With a whole different set of experiences and uh, uh, and qualitative perspectives that are often times in story form you know in some kind of—can be recounted verbally in a variety of different ways, or in writing, in language. …Sometimes that distorts, I think and devalues the bigger picture view that you get from a broader level of research about a subject. …And my argument would be while I think that particular perspective and I think Hal's strength is that everyone's not like him. If all we did was hire retired executives I think we would not have a very strong, a very strong training and professional development group.

Peter uses an analogy of buying a car based on a favorite uncle's advice:

> I use this example with my students—you're going to go buy a car. Your uncle, who, you know your favorite uncle says you have got to, this is the best car I've ever had, you have—you know this is the car you need. …You go out to, uh and do some research and you find out that's the worst car that's ever been built based on the research about maintenance and upkeep and all that kind of stuff. I said, you know my question to them is who do you believe? Well if you are looking at things from an academic perspective and an objective perspective, you're going to put less credence in what the individual experience is, the individual qualitative experience only experienced by the one person you know versus all the researched information coming from a variety of sources all culminated in one place.

While Calvin struggled with the idea of negatives, he ultimately provided an example that supports Peter's perspective. Calvin suggested that Hal's popularity with students encourages them to take many of his classes, perhaps missing out on alternative perspectives. "It's almost like he's a victim of his own success", Calvin said.

In my conversation with Jan, she wondered aloud whether Hal's storytelling was sometimes excessive, but she ultimately decided the story telling was a positive not a negative. Jan offered an example of how Hal's unconventional approach can occasionally be misunderstood:

Hal did extensive training with one of companies several years ago. He was asked to come in and train employees in taking responsibility. It was really lean, and introducing those concepts into their processes—taking responsibility for seeing waste and getting rid of waste. He was really teaching the people in the class to make changes and to take responsibility and don't let things just pass. He discovered that he was stepping on the toes of management. They did not want their employees to take that role, that responsibility. Everything was dictated down to them. And they did not want them to be instigators of change. Hal saw where they were really making some big mistakes and he was very vocal, and shared that very openly in the classroom. Management asked him to not come back to the company.

That was several years ago. All the things that he had brought up came to fruition. The negatives that he brought out about their company became realities and became real problems for them. The company was being basically dictated to by their suppliers on quality issues that they needed to introduce. They invited Hal to come back and Hal has spent a lot of the last year there. He's very outspoken; he's very direct.

Perhaps because Kendall is not as close to Hal personally as some of his other colleagues, she was able to provide more examples of potential negatives. Kendall finds Hal to be sometimes out of date and out of touch with current manufacturing practices:

Some of the challenges we have is that he is a little out of date with current trends and current topics and current practices in some aspects of the job that he used to do. So it's a bit of a challenge when he's talking about things that are not strictly, purely manufacturing—it's a little challenging now because the world that he worked in is very different than it is now. So when he's talking to students in some of the settings that we have he's not always as uh not accurate. He's not always as crisp and on spot on some of those other peripheral type things.

Calvin and Jan, in contrast, believe Hal is up to date and on trend in his knowledge of manufacturing. Ultimately I decided that the timeliness of Hal's knowledge was a matter of perspective; Hal regularly completes repeat training and consulting contracts with large manufacturing firms. Client satisfaction surveys show that clients rate Hal highly. Kendall's differing perspective helps me remember that not every teacher is a match for every student nor is a consultant a match for every client.

Kendall suggests that Hal's charisma may allow students to believe him when he occasionally presents inaccurate information:

The challenge would be, just like any educator, it's hard to admit that you don't know something, sometimes, so he might—and I've seen this—where he has made or at least said something that is contradictory to, to a particular situation, but he's just explaining it the best way he knows that it's just no longer active. For instance talking about labor situations—In one of our courses we talk about employment law and when I first started teaching that with him—we co-taught for a semester—he was calling it business law but the, that, I know it's semantics but business law is entirely different because you're talking about small business and all the functions of that whereas employment law—which is what he was going for—has to do with labor law has to do with civil right stuff, safety legislation, those kind of things. … He didn't have the information to really go there, so he did what he could but it really—in some ways people, some of the stuff that he said wasn't really accurate. And sometimes I think people because he's such a, such a personality that they literally hang on his every little word. So if he implies something that may not be factual, they don't have the ability to distinguish that that might be a little bit exaggerated…

Peter, on the other hand, praises Hal's ability to admit when he does not know the answer or when he does not have experience in a particular subject.

Kendall's perspective—although it is different than mine—has allowed me to identify a new insight into Hal's personality. Kendall is able to see when I could not, Hal's need for approval. She offers this example:

Hal may not, he says that he does not care about what others think, but he craves attention. He really does. So he's got high, high needs as far as having, I don't mean like adulation like bowing and worshiping, but he wants really badly to be accepted by the people that he teaches…For Hal um it means spending a lot of extra time at the corner of Grand and Hal smoking, when he's got people in his class that smoke. It means going to the classroom an hour earlier just to, just to talk to people or listen to what they have to say or staying over an hour afterwards. He and I are often here, are frequently here around 8 o'clock at night is when our classes let out and I'll see him in the parking lot when I'm leaving and he's still out there talking to people. Now whether they're holding him captive or he's holding them captive, I don't know.

I have observed Hal's out of class time with students, I saw it as evidence of his commitment—another example of "making a difference". Kendell's perspective helps me remember and acknowledge that I view Hal's actions through my own lens—a lens colored by my affection for him. Perhaps Hal's time commitment with students is evidence of *both* his need for approval and his need to "make a difference".

Summary: Effect on others.

Hal's telling of his life story has had varying effects on others. Hal's colleagues provide differing perspectives on his work in the classroom and his storytelling. Each of Hal's colleagues has a warm and collegial relationship with him, although not all his colleagues are his close friends. His colleagues each observed how Hal's experience and ability as a story teller bring a unique voice to the university and to students—a voice that provides a counterpoint to traditional academic perspectives. Hal's position as the voice of experience also has potential negatives both for the institution and for the students. Hal's colleagues disagreed on potential negatives; some colleagues saw the behaviors as negative while others saw the same behavior as a positive.

Chapter Summary: Findings

The grand tour question guiding the study of Hal's encore career in education was: How have the learning experiences of a retired manufacturing manager shaped his identity and influenced his encore career in education? This chapter has addressed each of the six questions that guided the study.

1. What biographical factors influenced Hal's decision to become an educator?

2. What generative factors influenced Hal's decision to become an educator?

3. How does Hal's telling of his life story make meaning of his life and work experiences?

4. How has Hal's life story narrative influenced his encore career in education?

5. What meaning does Hal ascribe to his experience of an encore career?

6. What effect has Hal's life story had on others?

Early experiences of caring teachers, poor teachers, and mentors are biographical factors that influenced Hal's choice of an encore career in education. Generative factors—impulses to

care for the next generation—also influenced Hal's educational career: his need to "make a difference" in the lives of others, his concern for the people in his charge, and his need to honor those who helped him in the past are important factors in Hal's choice of a second career. Hal's ability to tell his life story has served as a tool for Hal to reflect on his life experiences and transform those experiences into learning. His telling of his narrative reveals aspects of his identity as imagoes or alter egos, themes, imagery, and narrative tone. Hal's life story provides motivation for his entry into a teaching career as well as motivation to continue in that career after more than ten years. His life story also provides raw materials—content, methodology, and philosophy—for his teaching career. The telling of his life story also demonstrates how Hal makes meaning of his encore career; the narrative reveals Hal's personal code of values and beliefs, the ideological setting of his life story. Finally Hal's life experiences affect his colleagues in varying ways and provide a number of benefits for his students and the university for which he works. The behaviors that provide benefits may also be viewed as potential negatives depending on the perspective of Hal's observers.

Chapter Six

INTERPRETATION AND RECOMMENDATIONS

The purpose of this narrative case study was to discover how the life experiences of a retired manufacturing manager may have contributed to his encore career teaching workforce development at a regional university in the mid-south. The grand tour research question was: How have the learning experiences of a retired manufacturing manager shaped his identity and influenced his encore career in education? Questions that guided the study were: (a) What biographical factors influenced Hal's decision to become an educator? (b) What generative factors influenced Hal's decision to become an educator? (c) How does Hal's telling of his life story make meaning of his life and work experiences? (d) How has Hal's life story narrative influenced his encore career in education? (e) What meaning does Hal ascribe to his experience of an encore career? (f) How has Hal's life story narrative affected others?

Beyond these research questions, however, are bigger questions—what do the findings of the study mean? How may the findings be interpreted in regard to Hal's life? More important, how may the findings be interpreted in light of the challenges facing society in general and future retirees in particular? What in the findings is suggestive for future research?

This chapter will discuss five themes that arose from the research findings:

1. The Tensions between Education and Experience

2. The Effect of Experiencing the Generativity of Others

3. The Role of Generativity in Adult Learning

4. The Function of Storytelling in Reflective Learning

5. The Encore Career as a Benefit to Higher Education

The chapter will focus on each theme, linking them to the original research questions, the findings, and the literature. Recommendations for practice and future research will appear at the end of the chapter.

Theme 1: Tensions between Education and Experience

A theme that emerged throughout the data is tension or conflict between education and experience. Specifically, Hal's interview data and unpublished manuscript revealed a tension between traditional academia and the world of work. Hal stated this tension quite openly:

> I find education, by the way, behind the curve. Manufacturing has been doing stuff education should have done 10 years ago. And I still feel—if I look at lean, how to run an organization with the minimal number of people, if people are an issue, and still have a maximum impact and maximum output, I don't find that education does a good job with that. I think they are behind the times. We are layered with non-value-added activities.

Table 1 displays additional sample significant statement for Theme 1: Education versus Experience.

This education versus experience theme relates to three of the six questions guiding the study: the biographical factors affecting Hal's encore career, the generative factors influencing his encore career, and the influence of Hal's narrative on others.

Possible biographical factors favoring experience over education.

Hal's statements indicated a bias in favor of work experience over formal education despite his own employment in the field of higher education. Several biographical experiences may have influenced the development of this bias: Hal's own college education experiences, Hal's experiences supervising young employees, Hal's experiences working with consultants, and Hal's experiences with higher education colleagues.

Hal's undergraduate college experiences may have influenced the development of his bias in favor of work experience. Hal's first college experience ended in humiliation at the

hands of a speech teacher; Hal's father took him out of school. The family eventually spent

Hal's college fund to purchase a home. Several years later, a more mature Hal tackled

undergraduate education anew and successfully completed a degree at a private college. Hal

remembered taking management courses in college that were "absolute bull. Was not going to

work on the shop floor. I had several of those classes in college, and that was an absolute waste

of time". In fact, Hal's college education did not prepare him for work in the manufacturing

field. To acquire his first job in manufacturing, Hal was forced to lie about his degree; he was

hired because he wrote on an application that he had an eighth grade education. Hal's college

experiences were both positive and negative; neither the positive or negative experiences,

however, prepared him for his first management job nor helped him gain employment.

Work experiences were also possible sources for Hal's bias toward experience. During

his years in management, Hal supervised a number of young engineers who were academically

prepared but who were unready to put their knowledge to work in a work environment. In his

unpublished book manuscript, Hal spun several tales of IEs and SAEs—Hal's private acronyms

for "incompetent engineer" and "smart ass engineer". In one notable excerpt Hal wrote about

how hourly employees knew more about operations than one particular "SAE":

> You thank everyone and as they leave you ask the SAE to stay a moment. You close the
> door and quietly say, "Those goof-offs and that stupid, big, dirty mountain man just did
> your job for you. I want you to work closely with those *experts,* and maybe when we
> have finished this job, you will have learned something".

Another possible source of bias was Hal's experience with business consultants who

brought educational credentials but no results. Again Hal's unpublished manuscript was the

source of more vivid description. The following excerpt describes the arrival of a consultant

group:

> … arrives headed by an exalted guru and a staff of green beans fresh out of Ivy League
> schools and Texas A & P. They are all armed with laptop computers with the latest

software, and ready to download it into your system that your people haven't quite got the hang of yet. And they do! They install their proprietary **"one size fits some"** program.

Another story of problematic consultants was one of the nuclear episodes in Hal's life story. Hal found himself the lone voice of opposition when his president considered hiring a consultant's group that had created a famously failed manufacturing plant.

A final biographical factor that may have influenced Hal was his experience working in higher education. While Hal's current co-workers each have extensive business and industry experience, in the early years of Hal's teaching career he worked with several Ph.D. qualified faculty members who had no work experience outside academia. While Hal says he appreciated the theoretical knowledge and hard work required to complete their academic preparation, he was ultimately frustrated by their naïve approaches to business problems and the lack of "real world" examples in their classes.

Possible generative factors favoring experience over education.

A different perspective on Hal's bias in favor of experience perhaps may be traced back to his sense of generativity. Two primary generative factors emerged in Hal's interviews: his mission to "make a difference" and his wish to treat people in his care well.

Perhaps Hal favored experience over education because his experience was the avenue through which he could best make a difference in the lives of his students. He said:

> And I can make a difference that some of my, my associates can't make. Because although their degrees are clearly superior to mine, their experience is either very limited or totally non-existent. I can tell a young man or a young woman what they are really going to face. Right down to the first and to the last cussing they're ever going to get. From a peer. From a boss. I can tell them how to properly respond to it. I can tell them what you really need to do to really get ahead other than being politically correct.

Another possible reason for Hal's bias was his desire to take care of the people in his care—his employees or his students. Throughout Hal's stories the theme of taking care of "my people" surfaced again and again. In his work experience, Hal found himself in the role of

champion for the hourly employees; any hint of snobbery toward hourly employees (experience) by professional engineers (education) roused his sense of chivalry. Hal naturally came to the defense of those of lower status.

Hal's effect on others.

Hal's pro-work experience bias was somewhat vehement, but his attitude was not uncommon in his group of colleagues. Each of Hal's colleagues spoke of Hal's experience as a key factor to his effectiveness in the classroom. Kendall, for example, said, "it allows him to make connections that are very real, rather than superficial or textbook". Jan also referred to his point of view as "real world". She spoke frequently of his ability to use his experience to make concepts real and applicable for students. Even Peter, the university chancellor, cited Hal's experience as a necessary "for profit world" point of view that provided a counterpoint to the thought of traditional academics. The tension between experience and education, then may simply be a factor of the environment—business outreach—in which Hal works.

Other explanations.

Aside from biographical, generative, and social influences, Hal's own personal fears and doubts could be at the root of this conflict between education and experience. Hal works in an environment in which his degree—a B.S. in Theology—is considered insufficient preparation for a career in higher education. It is possible that simple bitterness at being perceived as a low status faculty member may have been behind the vehemence of some of Hal's remarks about his "Ph.D. friends".

Another possible explanation is that Hal's attitude was typical of the industry environment in which he came of age. In a career of more than 30 years in manufacturing management, Hal has observed the skills and knowledge that help workers succeed in a work

environment. As a straightforward person, Hal was not hesitant to share his own opinion which is common among many business leaders.

Perspectives from the literature.

The tension between education (academic preparation) and experience (industry work experience) in higher education is an issue that goes beyond Hal and his colleagues. The importance of experience for the adult learner has long been recognized in the adult learning literature (Knowles et al., 2005; Mezirow & Associates, 1990, Mezirow, 1991). While a search of the literature for faculty industry experience revealed several articles about industry/faculty research collaborations, grants, and student internships, very few articles addressed the importance of industry work experience for faculty members. Several articles from the engineering and hospitality disciplines, however, dealt directly with issues of faculty work experience outside academia.

Fairweather and Paulson (1996) used faculty survey data to determine whether previous industry experience affected faculty attitudes about teaching and research. The authors found that faculty with industry experience spent more time teaching, were more likely to teach undergraduate students, were less likely to move into positions that were primarily research based, and were less likely to believe that research should be the primary criterion for promotion. The authors determined that lack of attention to teaching and the lack of faculty knowledge of current industry design practices were significant factors affecting the decline of competitiveness in American industry. Fairweather and Paulson (1996) suggested that hiring faculty members with previous industry experience would be a feasible step toward improving the teaching in university engineering programs.

Improving engineering education was the focus of an article by Lamancusa, Zayas, Soyster, Morrell, and Jorgensen (2008). The authors identified several reasons to change the

way engineering is taught including the fact that students want hands-on design experience, industry is demanding change, and "the qualifications of the professoriate are not optimized for teaching" (p. 4). The authors pointed out that a minority of engineering faculty members are registered as professional engineers or have industrial experience; few faculty members have any experience in education or teaching. They attributed the lack of professional experience to academic systems which reward research activity at the expense of teaching. Richter and Loendorf (2007) also spoke directly to the importance of faculty with industry experience. They wrote:

> The value of industrial experience in the classroom cannot be overemphasized. Professors with industrial experience bring a different viewpoint and perspective into the classroom. Understanding the theory behind engineering will always be significant and important. However, the importance of their industrial experience is enormous and invaluable as it is shared and used in the classroom. The students are now perceived as engineers in training and treated as such. Excuses are no longer tolerated and results are expected. The harsh realities of the industrial world are imposed in the classroom environment closely reflecting what happens in real life. (p. 3)

Literature from the hospitality industry also focused on the importance of faculty work experience. Chi and Gursoy (2009) found that faculty experience was the second most important factor following internships in placing hospitality graduates in jobs.

Conclusions: Education versus experience.

Was Hal merely working from his own experience and values? Was Hal justifying his own low status degree? Was Hal genuinely trying to make a difference by correcting what he perceives as a wrong practice? I believe that while many factors influenced Hal's attitudes about the importance of work experience, his opinions are representative of those widely held in the manufacturing industry. Hal's emphasis on the importance of bringing experience to the classroom was not just a factor of his life experience and his wish to make a difference. When Hal expressed annoyance about college courses that do not accurately represent the realities of

work, he spoke for his former associates in industry. Ultimately, Hal related to the point of view of industry rather than the point of view of higher education.

Theme 2: The Effect of Experiencing the Generativity of Others

The next theme that emerged from the data was the effect of experiencing the generative actions of others. When I asked Hal about the overall theme of his life story he said, "I've got a lot of help. That's the theme. From almost literally the time that I was born, I was exposed, taught by, surrounded by caring people who helped Hal along the way". Table 2 displays additional sample significant statements for Theme 2 Experiencing the Generativity of Others.

This theme of experiencing the generativity of others relates to two of the six questions guiding the study: the generative factors affecting Hal's encore career and the meaning Hal ascribes to his encore career.

How the generativity of others affected Hal's own generativity

Hal explicitly attributed his success in life to the principles instilled by his parents and to a series of interventions by teachers and mentors who made a difference in his life. Hal has reflected on this particular aspect of his life experience. Many times throughout the interview data Hal attributed some lesson or ability to a teacher or work mentor. The important mentors Hal mentioned included the grade school teacher Mrs. Faith, his high school principal Mr. Worthington, his gruff boss Monty Hunter, and his gentle president Mr. Sullivan.

Mr. Worthington, who became Hal's friend as an adult, was the person to whom Hal attributed his encore career as a teacher. Hal tied his teaching today explicitly to the intervention of this high school principle:

> But a principal -- that's another caring teacher by the way. Oh I'm just full of caring teacher stories—who actually are turning points in a life. That's one of the reasons I teach today. He told me I had a debt that I needed to pay back. And I'm trying to pay the debt back.

Should we take Hal's tale at face value and accept that this special teacher and other mentors are the reason he mentors and teaches today? Hal may be doing exactly that— purposefully "paying forward" the help he received. On the other hand, Hal may be motivated more by the promise he made to this specific principal.

Meaning Hal ascribed to his encore career.

Hal's narrative was rich in references to a number of mentors and teachers; it was also rich in references to a need to make a difference in the lives of others. In his own generative activities of teaching and mentoring, Hal explicitly connected this activity with his need to "make a difference". He said:

> But if I hadn't have had someone who saw something in me that I couldn't see I would have never, I wouldn't have been there. That would be the bottom line. And my job is to see something in other people that perhaps they don't see. To see greatness that they can't see. To see talent that they can't see. And if you can ever get the little devils believing, just like me they'll get the job done for you.

Again do we accept Hal's connection between his experience of generativity as a young person and his generative actions today?

Possible alternate explanations.

While I tend to accept Hal's connections between his younger experiences benefiting from the generativity of others, there were a few incongruous factors that raised some questions. First, amid all the descriptions of mentors and teachers, Hal shared some contradictory examples. Hal discussed in detail one particular teacher—his undergraduate speech professor—who humiliated and mocked him because of his stutter. As Hal told this particular tale, he seemed motivated by proving this man wrong. In this case Hal's success happened despite this teacher. An important factor to consider, however, is that he eventually conquered his stutter through the help of another "caring teacher" at a different university. Another interview excerpt also contradicted the image of Hal surrounded by mentors; he says, "The thing that took me so long

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to get good at was I didn't have a mentor or a teacher. And I made every mistake that was possible for human being to make and not lose his job". While I believe Hal was speaking in regard to a specific work context, it was interesting to hear a definite statement about *not* having the help of a mentor or teacher.

Another incongruous factor was Hal's tendency to describe these mentors and teachers as initially threatening or as potential enemies. In describing each of the most important mentors, Hal set the scene as potentially threatening. Intitially Mrs. Faith made him stay after school and he "hated" her for it. Mr. Worthington got in the way of Hal's truant adventures and "turned the air blue" in speaking to him. Monty Hunter terrified all the supervisors to the point that they literally "hide" from him. Even the gentle Mr. Sullivan, approached him at a trade show and intimidated him by asking him to dinner. In each of these stories Hal used a narrative technique of setting up a "bad guy" only to reveal this enemy as a mentor in disguise. Because Hal is a story teller it is possible that this narrative trick was a rhetorical device he used to make his stories more dramatic and more interesting. It is also possible that Hal had some ambivalence about these figures. Perhaps he resented each mentor originally. Perhaps he was trying to illustrate his own tendency to distrust.

Perspectives from the literature.

Very little in the literature directly addressed how the experience of the generativity of others affects generativity at mid-life. Peterson and Stewart (1996) studied a longitudinal sample of women who graduated from Radcliffe College in 1964. More than 200 women participated in the initial survey; more than 100 women participated in each of the following waves of data collection. Peterson and Stewart examined several antecedents of generativity. The fifth hypothesis of the study was that highly generative women would have had an influential mentor

in their early lives. The authors found that women who were influenced by a mentor in early

adulthood showed high generativity motivation in later life.

While many studies focused on the generativity of adults, very little was available about

experiencing the generativity of others. While none of the literature explicitly discussed this

issue, the work of Vaillant (2002) and McAdams (2006b) was suggestive. Vaillant wrote:

> First, there are the complex ways in which a chain of events is launched in childhood that
> allows the child to develop trust, autonomy, and initiative. This chain of events allows a
> child's hope, the child's sense of self, and the child's self-efficacy to forge the
> relationships and social supports leading to self-care and an enriched old age. (pp. 83-4)

While Vaillant did not refer specifically to experiencing the generativity of others, he linked care

in childhood to successful aging. Vaillant discussed how positive experiences in childhood were

more predictive than negative ones:

> Good mental health, good coping both as children and adults, warm friendships, admired
> fathers, and loving mothers predicted high income. In contrast, dysfunctional families
> and fathers on Welfare did not predict future income. Perhaps the best summary
> statement is, What goes right in childhood predicts the future far better than what goes
> wrong. (p. 95)

The positive experience of receiving the generative attentions of others may be predictive of

adult successes.

McAdams (2006b) in his work on the redemptive stories told by highly generative

individuals wrote:

> Highly generative adults are much more likely than less generative adults to emphasize in
> their autobiographies ways in which they felt lucky or advantaged early on in life. The
> advantage they think they enjoyed is typically not economic or material. Perhaps,
> instead, Mom liked them the best. Perhaps they had a special skill. Perhaps they had a
> teacher or an uncle who sought them out for special treatment. Whatever, they believe
> they were fortunate in some way. (p. 8)

McAdams also pointed out a corollary—adults who exhibited low generativity told narratives in

which potential positive role models like parents, teachers, or bosses failed to provide

generativity and care. Again while McAdams did not explicitly address the experience of others'

generativity as a predictor of adult generativity, his discussion of the redemptive tales suggested that such a connection may exist.

Conclusions: Effect of the generativity of others.

Despite some ambiguity in his narrative language, for Hal the effect of experiencing generativity was directly connected to his own expressions of generativity in later life. While this connection was not directly discussed, the literature addressed this connection obliquely. Due to the lack of literature on experiencing generativity, this particular phenomenon is ripe for future research and study.

Theme 3: How Generativity Motivates Learning

Another theme that emerged from Hal's life story was how his sense of generativity has motivated him to continue learning. Through the reflective process of participating in this study, Hal has explicitly connected his learning to generativity:

> Back to your what's a lifelong learner question—I want to know as much as I can possibly learn, because the more that I know the better I can teach the people that I have now. I don't—I teach by class name the same classes today basically that I taught when I came to work here nine or ten years ago. But they are not the same classes that I thought that I taught nine or ten years ago. The title is the same; the content is totally different. Because I learned more in that 10 years. And the more that I could learn the more I could offer the students.

Table 3 displays additional sample significant statements relating to Theme 3: How Generativity Motivates Learning.

The theme of generativity motivating learning relates to two of the six questions guiding the study: the generative factors affecting Hal's encore career, and how Hal makes meaning of his life and career.

How Hal's generativity inspires his learning.

Throughout our interviews Hal shared many instances where a sense of generativity motivated him to continue learning. In his career Hal expressed a need for "his people" to be

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better than he was at the job. As a result Hal wrote training materials based on his own

experience and his extensive reading, then hired the university where he now teaches to deliver

the training. To complete these training materials, Hal had to engage in learning himself. In his

teaching career Hal frequently engaged in learning projects with the intent to improve his

classes. He said:

> I don't do it because I have this compulsive desire to go out and be this continuous, I'm not a continuous learner by choice. It's not like boy at one moment in time decided I'm going to keep on learning. I've just never made the other choice and said I know it all and therefore I'm going to stop learning or to say that I don't know enough and I'm going to not learn. I just keep finding events that require one of two choices: I'm either going to get really good at it, which has been my nature my whole life uh or I'm going to let it go. And I don't know how to let it go. I don't know how not to learn.

Hal's generativity in his personal life has also led to continued learning. Hal's grandson

suffered from ADHD. Hal has spent significant amounts of time learning about ADHD, and

testing and teaching methods for ADHD students. Hal's director, Jan said of Hal's learning

efforts:

> … his commitment to his grandson to teach him to read, looking for new ways and new avenues. It reminds me of the way he is in his classroom. It's reminiscent of the dedication that he has to his students. Of course I'm sure it's probably a greater dedication because it's his grandson but his dedication to develop that child into a well-functioning, successful, happy human being is amazing. I just think he is so neat—he's written books to help him, illustrated the books,—it's just been amazing to me the time and the effort that he has given to his grandson.

Hal's role as caregiver during his wife's major illnesses—Crohn's Disease and

Alzheimer's disease—also inspired some unconventional learning. During his wife's struggle

with Crohn's she was bed-ridden for more than three years. During that time, Hal learned to set

and style women's hairstyles so that he could perform that service for his wife. Later when her

Alzheimer's disease worsened, Hal spent hours learning about the disease and its progress so that

he could better care for her.

As Hal and I completed our interview process, Hal was reading a new leadership book and brainstorming ways that he could incorporate the concepts into his upcoming lean enterprise class. Hal not only pursued new learning opportunities, but most importantly he searched for ways to incorporate that learning so that it could benefit his students.

The meaning of generativity in Hal's encore career.

Hal's life story narrative included several imagoes or alter egos. Perhaps the most influential was the imago of teacher. Hal has mentioned to me several times that as a plant manager he was a teacher. His personal mission—repeated like a mantra throughout our interviews—was "make a difference". Hal's identity is built around this need or drive to make a difference in the lives of others. At an age when many of his peers are enjoying retirement, Hal continues to learn new things with the intent to use that knowledge to help make a difference. He said:

> You don't know how long I'm going to be here. Or I'll just decide enough is enough and I'll find something else—some *thing* else to do to make a difference. And I'll go try. But before I go I will have had to learn probably another skill set that I don't possess today.

Possible alternate explanations.

Do we accept Hal's link between generativity and his continued learning as an adult? While I, like Hal, saw a link between his generative impulses and his learning projects, it is possible that Hal sought out new learning experiences for the enjoyment of learning something new. Along with the learning experiences that appeared to have their roots in generativity, Hal has also shared personal learning projects with me that appeared to have little link with generativity; at various times Hal has researched dirt biking, dog grooming, horse breeding, and square dance calling.

It is possible that Hal simply enjoyed learning and there was no particular relationship to generativity. He said:

There's so much out there. Every day for me is a new day to learn something new. And with me it's a new book, it's a new piece of research on the computer, at the library downtown. …The good part is I enjoy the chase. I enjoy going and finding something that I didn't know how to do this and now there's something new.

Another explanation for Hal's commitment to learning may be that learning was required to be successful in his work. His ongoing commitment to learning how to use computer business applications is an example of learning that is necessitated by the demands of his job rather than by any particular sense of generativity.

Perspectives from the literature.

While little literature was available that explicitly linked generativity to learning, sources were suggestive of a relationship between generativity and learning. Sarah Lawrence-Lightfoot's 2009 study of learning in adults over 50 found that generativity was a factor in the learning of her subjects. Participants were motivated by a need to "give back" to their communities; their new projects required learning. Russell's (2007, 2008) phenomenological study of late in life computer learners suggested that learners were sometimes motivated by generative concerns. Russell provided an example of a volunteer writing tutor who pursued computer training because she was unable to help a child use the computer in a writing assignment. Another example from Russell's study was that of several learners who were motivated to learn to use the computer in order to compile a family history. Hebblethwaite and Norris (2011) found in a study of grandparents and their grandchildren, that not only did grandparents teach and mentor their grandchildren but there was reciprocity of learning. In other words, in expressing their own generativity toward the grandchildren, the grandparents also learned and were motivated to learn. Parisi, Rebok, and Carlson (2009) found that older adult volunteers in a school tutoring program attended extensive training to prepare for their volunteer duties.

Conclusions: How generativity leads to learning.

While Hal was a self-directed learner who frequently took on learning projects for enjoyment, I believe Hal was often motivated to learn by his sense of generativity. Hal's concern for his bedridden wife, his grandson, his employees, and his students has prompted him to engage in learning projects that helped him care for others. Although there is a body of literature on generativity and an even larger body of knowledge on learning, there were only a few studies that suggested a link between generativity and learning. The connection between generativity and adult learning may be a rich source for future research.

Theme 4: The Function of Storytelling in Reflective Learning

A fourth theme that emerged from Hal's life narrative was the important reflective role that storytelling has played in Hal's learning process. Hal said of the experience of participating in the research:

> No, it was interesting. Uh, I had never linked all those things that we talked about. Your questions were fascinating. And I had told those stories, that thousand stories we told a thousand times. And yet I had never put them in sequence. And when you caused that to happen it actually opened my eyes. Uh, to me it was a series of separate events that just happened over time and I never linked them.

Table 4 displays additional sample significant statements relating to Theme 4: Storytelling as Reflection.

The theme of Storytelling as Reflection is related to two of the six questions guiding the study: how Hal's telling of his life story makes meaning of his life and work experiences and the meaning Hal ascribes to his experience of an encore career.

How Hal makes meaning through storytelling.

Storytelling was a method through which Hal was able to reflect on his life experiences, question his own assumptions, and in some cases accomplish perspective transformation. Hal recognized his own propensity to use stories. In discussing his admiration for quality guru W.

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Edwards Deming he said, "He was a storyteller also—and maybe I'm the *also*". Each of his

colleagues with whom I spoke referred to his storytelling. Former colleague Calvin even

referred to him as "the Mark Twain of storytelling". I see this storyteller as a major component

of Hal's very identity—the over-riding imago of his life story.

      New insights through stories.

      As Hal shared his stories with me, he clearly made new connections and reached new

insights as we spoke about his experience. For example, during our initial interview Hal told me

about his earliest memory. Hal's earliest memory was of being a toddler of perhaps two or three

years of age playing with his mother's necklace by dangling it through the cracks in the wooden

floor boards of his rural home. Hal remembered dropping the necklace and then remembered the

terror of being in trouble. When I ask him the meaning of this story, he at first said the story had

no meaning. Then he suddenly made a connection to his fear at important and life-changing

moments in his life. Through telling the story he formulated this insight about his life:

> What it really says, is my—and maybe it's because I always have been afraid so much of
> my life, the person, to me, that has courage is the person that has the ability to face and
> act with what scares the pee out of him. If it doesn't scare you, it doesn't take any
> courage to do it. Hell, I've been afraid most of my life. Then you just go out, and do it.
> It doesn't matter that you're scared to death.

As Hal spoke I had the impression that this was a new insight for him; he had never before

reflected on how he dealt with and overcame fear in his life.

      Throughout our interviews, Hal made new connections and came to additional insights as

he told me stories about his life (see Table 4). At different times, Hal examined his own

motivations, made connections between experiences that had seemed unrelated, and thought

deeply about his own future. For Hal the act of telling the story provided him the opportunity for

discourse that Mezirow (1991) identified as a part of transformative learning.

Often-told stories versus new stories.

As Hal shared his life stories, it was apparent to me that some of the stories were often-told tales. The stories were polished with a strong narrative structure. An example of a story like this is the story of his aggressive boss Monty Hunter. In this story, Hal's boss was verbally abusive and Hal stood up to him, "going to war" for a period of months. Eventually Hal had a stroke and he learned that during his hospitalization Monty was a constant visitor. He learned that his perceived enemy, while deeply flawed, was a mentor who had important lessons to teach him about business. During our friendship, Hal has told me this story several times. Each time, the story was used to make a particular point. The story had become a flexible tool that he used to illustrate almost any point he wished to make. In my opinion, Hal had fully processed this story. He reflected on this story long ago and had revisited the assumptions that he held at that time in his life. Hal had learned lessons from this event and the tale had become a tool for him to communicate with others.

Other stories are newer. Hal appeared to still be processing these experiences. For example, stories about his teaching years were less vivid and less structured than stories Hal told about his earlier career. While Hal may simply have been less interested in the teaching era of his career than his time in manufacturing, I believe the difference was that Hal was still reflecting on these experiences and the meaning they hold for him. For instance, a new and world-changing experience for Hal was the loss of his wife of 50 years to Alzheimer's Disease. When Hal talked about the period of Dixie's decline and death, the stories were fragmented—a series of vivid but disconnected scenes. These communications were not yet stories with a beginning, middle, and end. Hal did not yet tell stories about this experience; he was only beginning to reflect on the meaning of the experience and to examine his assumptions about life before her death. He offered some tentative insights about learning to depend on others, but it

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was clear that Hal was still in the middle of reflecting on the experience. I believe in time he will shape this experience into a narrative that is as vivid and full of insight as his early stories. For Hal then, storytelling appeared to be the process through which he reflects on his life experiences and attributes meaning to them.

Hal's transformative learning.

In Mezirow's (1991) conception of transformative learning, the adult reflects on life experience and either gradually or suddenly reassesses previous assumptions. Hal's life story narrative was full of instances of transformative learning. I will examine two of these stories in terms of transformative learning: Hal's experience with high school principal Earl Worthington and his story of his first "success story" as a teacher.

In Hal's narrative that I called *Rebel without a Cause* he shared the story of how his high school principal moved him from a path of potential juvenile delinquency by getting him involved with his high school chorus program. Hal experienced a "disorienting dilemma" (Mezirow & Associates, 2000) through his principal's intervention in his life. Gradually throughout his adulthood, Hal reflected on the meaning of this intervention and came to recognize it as a pivotal moment in shaping his future. Eventually Hal became friends with the principal as an adult and promised to show his gratitude by "paying it forward"; he agreed that he would one day teach himself. In this episode, Hal's assumptions about the possibilities for his life were incrementally changed by his relationship with this important mentor. In adulthood, he realized the importance of this intervention and came to see the possibilities for other young people. His assumption that the principal was interfering transformed into his perception of the principal as a mentor and friend. In this instance, the transformation was gradual, incremental. It took place over decades.

An example of a more dramatic or epochal change (Mezirow & Associates, 2000), was

Hal's experience of making a difference for a student of his own. Hal shared the story of being

frustrated in the early days of teaching because he felt like he was having no impact. Then one

night he received a phone call from a former student who had received a promotion. The student

attributed the promotion to Hal's influence. From this disorienting dilemma, Hal suddenly

realized that teaching was not a profession that brought instant gratification; teaching was an

investment in the future. Hal's assumption that his work did not make a difference was

dramatically reversed by this experience. Again this was example of transformative learning.

Alternate explanations.

Was storytelling Hal's method of reflection? I believe it was Hal's preferred method, but

it is possible that Hal's stories were the *product* of his reflection rather than his *process* of

reflection. It is possible that the moments that I recognized as moments of insight during our

interviews were only moments when Hal was correcting himself. Hal's earlier stories may be

more polished narratives simply because he had more time to shape them. I believe that Hal has

thought deeply about his life experiences; it is likely that storytelling may be only *one* way in

which he engages in reflection.

Perspectives from the literature.

Storytelling was mentioned frequently in the literature on transformative learning. Taylor

(2009) mentioned storytelling as an example of how practitioners can use a holistic approach to

foster transformative learning in adults. Butterwick and Lawrence (2009) described using

theatre as a tool to foster transformative learning; they wrote, "Reflection can happen through

description, oral or written storytelling, or embodied activities" (p. 37). Taylor (2009) identified

storytelling as a way in which organizations could overcome barriers to communication to foster

transformative learning. The process of facilitated storytelling was a tool that practitioners used

"as a legitimate organizational process with both strategic and tactical implications that can cut across the whole organization, affecting large-scale changes to key processes and shifting the workplace practices and assumptions of individual contributors" (p. 137). Belinky and Stanton (2000) identified storytelling as a tool for "entering into another's frame of mind" (p. 87). Mezirow (1991) identified storytelling as both a formal and an informal tool for perspective transformation.

Conclusions: Storytelling as reflection.

Although in some cases Hal's stories may be the polished *product* of his reflection, Hal also appeared to use storytelling as a *process* of reflection. By sharing his life story Hal was able to reflect on his own experiences and gain insights into the meaning of them. For Hal, storytelling was a means to achieve transformative learning. His storytelling was the discourse that he used to both reflect on and communicate what he has learned from his experience.

Theme 5: The Encore Career as a Possible Benefit to Higher Education

The final theme that emerged from the study was how Hal's encore career has benefited the higher education institute for which he works. For example, Hal's former colleague Calvin said:

> He had a huge impact in this region on manufacturing companies, supervisors, their future leaders—there's a lot of people that point to him and say he kind of led them in the right direction with his teaching.

Table 5 displays additional sample significant statements relating to Theme 5: Benefits of Encore Careers for Higher Education.

The theme of benefits for higher education relates to one of the six questions guiding the study: how Hal's life story narrative has affected others.

Providing an alternate point-of-view.

Freedman (2006) wrote extensively about the potential benefits of the encore career to the social sector; in his works he mentioned K-12 teaching, social work, health care, and clergy. Freedman did not explicitly address work in higher education. I believe Hal's experience provided a model for how the encore career could be a resource in higher education.

When Hal first came to work for his university, the institution was a community college---an institution that naturally had closer ties to the community than a traditional university. Even in the community college atmosphere, Hal provided an alternate perspective. He came into the position qualified with a baccalaureate degree and more than thirty years of management experience. As Hal described it, he was hired specifically to bring the workplace "real world" perspective to his classes. As Hal's institution has evolved into a regional university, he has increasingly become a dissenting voice, a voice representing the world of work rather than traditional academic points of view. When I asked Hal what he brought to the university he said, "Oh, high blood pressure pills. Tylenol. Experience. Real life experience. A how to, a recipe book".

The chancellor of Hal's university, Peter, saw Hal's experience in a for-profit environment as a benefit:

> There are different bottom-lines for a profit company than for a non-profit company. There are different expectations, there are different constituencies and I think when you bring someone in from that arena into the educational enterprise they bring in a different way of viewing the world. And I think that is very important.

Hal's very outsider perspective was his biggest strength; as the chancellor said, "I think Hal's strength is that everyone's not like him".

Commitment to teaching.

Hal believed that his job was to "make a difference" in the lives of his students. He took

his commitment to teaching seriously spending substantial time out of class with his students.

His director Jan said:

> …he's open to staying after class. He spends every break with his students. They call
> him all hours of the day and night. I've been with him out of town when at the oddest
> time his phone rings and it's a student bringing up an issue and asking Hal how he would
> respond and what would he do. He brings that to the classroom.

Hal's co-worker Kendall agreed:

> …for Hal it means spending a lot of extra time at the corner of Grand and Hal smoking,
> when he's got people in his class that smoke, it means going to the classroom an hour
> earlier just to, just to talk to people or listen to what they have to say or staying over an
> hour afterwards. He and I are often here, are frequently here around 8 o'clock at night is
> when our classes let out and I'll see him in the parking lot when I'm leaving and he's still
> out there talking to people.

Because Hal taught "to make a difference", his level of commitment to students was not

necessarily typical for a traditional higher education faculty member who must juggle research

and service responsibilities.

Hal has noted that his colleagues frequently bemoan the current skill-level of students

entering their classes. Hal was impatient with this attitude. He believed in meeting the student

"where he is". He said:

> You know I wish my students were better prepared. I wish. But wishing it won't help
> them. Wishing that they were better prepared will not help prepare them. So to me it
> says you find out where your student is. You reach out and you bring them, you pull
> them, you coach them as far as you can possibly take them. You don't bemoan the fact
> that "I wish he/she was better". You take it as an opportunity, a challenge, to make them
> better.

Possible alternate explanations.

Hal is an unconventional higher education faculty member. He is uninterested in

research; he works in an appointment in which teaching is his primary focus. He had

unconventional academic preparation for his position—a B.S. and thirty years of business experience. As Hal's colleague Kendall pointed out, he is not particularly focused on the traditional academic concerns of "the textbook and chapter reading, weekly lessons, and regular testing that kind of stuff, he's not, he's structured in that regard in his classroom, but that doesn't mean he's not effective. It's just completely different".

Hal's chancellor Peter pointed out that the danger of only hiring retired workers was that the individual, qualitative experience was emphasized over the broader, research-based approach of traditional academia. He said, "Sometimes that distorts, I think and devalues the bigger picture view that you get from a broader level of research about a subject".

While Hal's commitment to his students seems exceptional, it is possible that the one-on-one time he spent with his students is not feasible for a typical faculty member. Indeed for some traditional faculty members, the personal commitment Hal displayed to his students was not beneficial because the level of personal attention might discourage personal responsibility in students as well as mislead them about the demands of other teachers.

Perspectives from the literature.

The literature on the encore career identified a number of jobs in the public sector that were appropriate for second career seekers including K-12 education, clergy, social work, and healthcare (Bank, 2009; Freedman, 2006, 2007); higher education was not included, possibly because of the extensive graduate academic preparation needed for so many jobs in higher education teaching. Instead higher education, particularly the community college, was proposed as a *resource* for encore career job seekers rather than a potential employer (Freedman & Goggin, 2008; Goggin, 2009). Goggin (2009) did mention adjunct college faculty positions as potential encore career options. Manheimer (2008) discussed retiring physicians and the need to either encourage these physicians to remain in practice or to pursue activities such as mentoring

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or international medicine; Manheimer mentioned adjunct medical faculty as a potential encore career for retired physicians.

Very little of the literature on encore careers addressed those who pursue academic careers later in life. Hal's academic appointment was unusual due to the mixed mission—both technical two-year and baccalaureate programs —of his institution. More study on faculty members with unusual appointments and non-traditional preparation might be illuminating given the benefits Hal has brought to his institution.

Conclusions: Benefits of encore careers in higher education.

The social purpose encore career in education is typically thought of in a K-12 context. Hal's career in education demonstrates that retired professionals can bring an alternate voice to traditional academia as well as a strong commitment to teaching. Although lack of academic preparation will likely discourage four-year academic programs from hiring retired workers, institutions that build strong relationships with business and industry may benefit from using non-traditional appointments to gain the benefits from retired practitioners and professionals like Hal.

Recommendations

The narrative case study of Hal B. suggested a number of recommendations for the practice of adult education and for future research.

Recommendation for practice

Educational programs for adults, whether two-year technical programs or baccalaureate programs, may benefit from the insights of an encore career seeker—a retired worker who is motivated by social purpose to teach. As Hal demonstrated, the desire to make a difference in students' lives may motivate encore career educators to commit more time, energy, and personal attention to students than they typically receive.

Encore career educators also bring in alternative perspectives and years of experience into programs that are designed to prepare students for a work life. While traditional academic tenure track positions will likely require a level of academic preparation that most encore career seekers may not have, the use of alternate appointments such as Hal's may be beneficial to bring the voice of work experience into higher education classrooms. For the community college institution, concerns about academic qualification are perhaps less pressing; the use of encore careerists as adjunct or full-time faculty members will continue to bring the experience and commitment of retirees into the classroom.

For institutions that include business outreach program such as the business and professional development center where Hal works, the encore career worker is a natural fit; retired workers bring both their years of experience and their network of business and industry contacts to the institution. Faculty members like Hal provide a link between the business and industry community and the academic institution.

Recommendations for future research.

Hal's experience of an encore career in education raised questions that are ripe for future research. Potential research questions that emerged from the study include the following:

1. What is the prevalence of encore career educators in higher education? What kinds of positions do the encore careerists hold in community and technical colleges as well as in universities? What motivated these encore careerists to enter higher education? What has their lived experience of an encore career been?

2. How do the tensions between faculty with traditional academic preparation and those with industry work experience affect learning for adult students? Is either group more effective in working with adult learners? Is there a difference in effectiveness between adult learners and traditional age students?

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3. How does experiencing the generativity of others affect generativity in later life? Are those who experience generativity in their youth more likely to engage in social purpose careers or volunteerism later in life?

4. How does generativity affect learning? Is generativity a motivating factor for adults to engage in learning? How are learning projects motivated by generativity different than learning projects motivated by other factors like work necessity? What is the lived experience of learning something new for the benefit of the next generation?

5. How does storytelling help adults reflect on and learn from their life experiences? How can storytelling be used with adult learners to help them reflect on experience?

6. How does the portraiture methodology help the qualitative researcher deal with issues of personal bias? How do portraitists deal with personal relationships with their participants?

Personal Reflections on the Transformative Journey

Generativity, narrative identity, and transformation were vividly illustrated by Hal's experience of his encore career as an educator. I would also say that those same concepts have shaped my personal journey of completing this research as well Hal's experience of working with me.

Generativity and the journey.

Throughout the research experience Hal has not only discussed his generativity but has taken generative action toward me; I have been the recipient of Hal's generativity. Hal's participation in the research was both generous and generative—an act taken to ensure my future success. For the first time, Hal is aware of the concept of generativity and has reflected on its meaning in his life. The life-long drive he has experienced to make a difference in the lives of the people in his care now has a name.

For me the experience of receiving Hal's generative action has heightened my awareness of how I can give back to others.   As a childless woman, I had never honestly reflected on the way generativity has affected my life.   More than ever I am now aware of my impulses to care for future generations through my care for my adult students, my colleagues, and the young people I work with in community theatre. My experience of Hal's generativity has helped me recognize my own long-time need to make a difference.

Narrative identity and the journey.

From the beginning of the project I knew that Hal's ability as a storyteller was important. Now I see how his ability as a storyteller has actually shaped his sense of identity.   Storytelling is the way Hal integrates his experiences into his sense of identity and a reflective tool through which he learns about himself.   In Hal's case, it has not necessarily been the experience that has shaped Hal's identity, but how he tells the story of his experience to himself and others.

By discussing his life experiences during this project, Hal told me that he has learned about himself and made connections about how disparate events in his life fit together.   For me the journey has helped me come to terms with my changing identity as a doctoral student and researcher.   In the past I never saw myself as a researcher.   Now I see myself as a researcher because this experience is part of the story that I tell myself and others. But of course that's not how the story goes exactly—I am not merely a researcher, but a *teller of other people's tales.*   I am the person who will help to create the legacy of others.

The journey of transformation.

Ultimately through reflecting on Hal's stories, Hal and I have both been transformed. The year of the study has been marked by personal turmoil both in my life and in Hal's.   Just prior to the project, Hal lost his wife of 50 years.   The months of the study have been marked by

Hal's grieving process and his adaptation to life on his own.   For me the project began with a serious health crisis, major surgery, and a long recovery.

By exploring his stories and experiences with me, Hal has explored the ways in which Dixie was a positive influence in his life. By telling me the stories of their marriage and of her role in his career, Hal has found a way to honor her and yet still move on to the next stage in his life.   From my point of view Hal has literally been physically transformed; when we began the project he was physically fragile, grieving, and dealing with health problems.   By the end of the project he was healthier and fully engaged in his teaching and in his life with his sons and grandson.

For me personally the project has also been transformative. During the earliest stages of the project I was working through a health crisis that led me to reconsider the priorities in my life. Now through my reflection on Hal's experiences and my own experiences as a researcher, I have moved beyond my personal fears and temporary physical limitations to renew my focus on making a difference through my teaching and now my research. At the beginning of the research project I saw myself as a student; now I see myself as a professional.

Portrait of Hal: A Final Sketch

As I enter my office suite I walk by Hal's office next door to my own. "Hi there!" he calls cheerfully as I pause in his doorway. It is summer now and Hal leans casually back in his office chair dressed in a crisp short-sleeved shirt. He is absorbed in a bright yellow and black book titled *Lean Six Sigma for Dummies*. Copies of *Lean for Dummies* and *Six Sigma for Dummies* are stacked neatly on his desk. Hal is on a mission; he often dives deeply into his books looking for some tidbit to share with his classes.

I settle in Hal's office for a brief conversation. He waves the book defiantly at me. "Listen to this damn passage!" he says. He reads me a passage of the book which is touting the benefits of Six Sigma processes for customers, suppliers, and various other stakeholders. "Who the hell is missing from that list?" he demands. I smile. I'm sure I know the answer. "The employees," I say. "That's right! Not one of these damn books says a word about the people!" Hal continues, passionate now about the employees of manufacturing plants past and future.

As he mounts a passionate defense of these employees, I stop listening really. Instead I sit back and watch him inspired by his passion. Hal, at the age of 70, is still passionately engaged in his work. For Hal this encore career in education is a way for him to continue making a difference in the lives of his "people". By preparing a new generation of manufacturing supervisors and managers he is now leaving a real legacy. He is helping younger men and women take on management challenges as well as vicariously taking care of the future manufacturing employees. They are his people as surely as his own employees were.

As our conversation ends, Hal is already buried in his book, muttering under his breath, looking for insights to share with his students during his class. Hal is still making a difference in the lives of others, including my own. Despite a difficult year, Hal is living the kind of productive second act that I hope to live myself—making a difference well into the retirement years.

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Table 1

Theme 1 Sample Significant Statements

Theme	Sample Significant Statements
Education versus Experience	*And then from that, what I call real life work experience. … And it was a different work time then. Degrees as we think of them today as a requisite for getting into management were thought of then as an impediment or handicap.*
	And I knew what was being taught in the colleges and universities was absolute bull. Was not going to work on the shop floor. I had several of those classes in college, and that was an absolute waste of time.
	And I consider myself so ignorant, so ill-educated as compared to our Ph.D friends here. They've done a wonderful job getting an education. I'm not sure they learned a hell of a lot. But I am sure they got an education. I am still somewhat in awe of that. I'm not in awe of their knowledge of their subject matter in some cases, although in some cases I really am just absolutely in awe of what some of them are able to accomplish.
	I can make a difference that some of my, my associates can't make. Because although their degrees are clearly superior to mine, their experience is either very limited or totally non-existent.

Table 2

Theme 2 Sample Significant Statements

Theme	Sample Significant Statements
Experiencing the Generativity of Others	*But I was blessed in having met people that cared. And that's the key. They cared. It wasn't just about me. They cared about most of their students. In my case they made probably a more major impact because I had more room for improvement than most kids did. And they made a huge difference.*
	And other people saw something in me that I didn't see in me.
	Totally changed the direction of my life. One principal with a pimply-faced juvenile delinquent, switchblade carrying, ignorant little shit, but a principal saw something that no one else saw.
	Bob was the other of a perfect example of a servant leader. He was the president. He could have anything he wanted. He never asked for it. His question was always, how may I serve you?
	Teachers. Great teachers. Teachers who found me, figured out who I was, and then figured out how to help and aid me to learn. It wasn't just one. It wasn't all of them either. Some of them sucked. It's just like any other profession in the world. There are great ones, and there are mediocre ones, and there are poor ones. But I was blessed by having more great ones than mediocre ones and poor ones. And it was a group of people that took an interest in a little boy when it wasn't necessary, and helped him transform from a little country, Arkansas, hillbilly into a moderately well rounded person. Without their help, and God only knows where I would be.

Table 3

Theme 3 Sample Significant Statements

Theme	Sample Significant Statements
Generativity as a Learning Motivator	*… a grandson with ADHD. Uh, as a grandparent I could listen to the doctors uh make their diagnosis and accept their diagnosis of the boy. I could listen to the teachers talk about what he can't do. Uh, I could listen to the principal that he, a principal he had talking about what he would be unable to do. Or I could study and find out what all people with ADHD have been able to do. Not what they're not able to do. But you can only do that by studying. And you can only do that by learning.*
	Five years ago I didn't know what ADHD was. And there's not a lot now available that I haven't read just to learn. I had a better reason to learn than most people did. You know I had something near and dear to my heart and maybe I could make a difference where some teachers couldn't and maybe we did. No, there's no maybe. We did. But it required that I learn.
	The learning to do a lady's hair was because at a moment in time my wife got sick and she was not quite bedfast but she couldn't get out of the house for about 3 or 3 and a half years. And I just learned how to do a woman's hair. I asked people that knew. I bought a couple of books on how to fix a lady's hair. It's no big trick to it.
	You don't know how long I'm going to be here. Or I'll just decide enough is enough and I'll find something else—something else to do to make a difference. And I'll go try. But before I go I will have had to learn probably another skill set that I don't possess today

Table 4

Theme 4 Sample Significant Statements

Theme	Sample Significant Statements
Storytelling as Reflection	*So my job was to make my people better. The argument against that is, well, you are extraordinarily selfish, and you know good and well that if you make your people better it will make you, so that is the reason you do it. Maybe so. I don't know. I hope that wasn't the reason I did it. But either way the result is the same.*
	It doesn't say a thing about it. Had no influence on it one way or the other. Maybe it did, in a way. You see, I think it's okay to be afraid. I was scared. I don't know what I was afraid of. I don't know if I was afraid of getting a spanking. I don't think it to a half you even think of what a spanking is. Don't think that was it. It says I've been scared most of my life.
	I don't know. I have no idea. It just change the way I did things. It makes me today -- I'm 70 years old -- I still read. I still, to this day, rarely read fiction. I read books about manufacturing. I read books like The Art of War. I'd re-read books that I find fascinating.
	I've got this little thing and it's just recalling the stories. And then you're right. I guess it would be called a dramatic license. We may change the character just a little bit. We may alter it, but the story in, as a whole is a true story. We may dramatize the story just a little bit.

Table 5

Theme Sample Significant Statements

Theme	Sample Significant Statements
Benefits of Encore Career for Higher Education	*Uh, other impacts for the university I see is, there's a lot of company's here in town, that because of the work Hal's done, uh, have a very favorable view of the entire university of all. He's kind of like uh (pause) Gosh. An emissary for the university.*
	I think the biggest thing Hal has, is he gets guys engaged and they leave after their degree or even continue on for up to a bachelors degree. We've had people leave workforce leadership—be plant managers. Uh, these guys got engaged. They got interested and they went from an uncaring, hey what can I do for myself up to now they want to make big changes that impacts everybody.
	So he has really made a an impression on them. A very positive impression. And I think that, then causes those companies to be great supporters of the university. Because they feel like we are here to support them. We are here to provide—to help them meet their needs they have whether in workforce development or looking for graduates. They feel like those students are getting real world education here.
	… from the people that I've talked to that have worked with Hal, uh, they've been very satisfied with his approach, with his demeanor uh, with his knowledge base and uh with his perspective and attitude towards the people that he's uh, being a consultant for, or, or being a teacher for.

APPENDICES

APPENDIX A

INFORMED CONSENT DOCUMENTS

Principle Subject

Colleagues of Principle Subject

INFORMED CONSENT

Principle Subject
Title: A Case Study of a Life-long Learner's Encore Career in Education

Researcher(s):

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Kit Kacirek, Faculty Advisory

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Description: This study will investigate how the life experiences of a retired manufacturing manager helped shape his encore career in education. This qualitative case study will focus on the meaning that the individual makes of his life experiences and how those life experiences are transformed into stories that inform his teaching. Your participation in this study will include the following: a life-story interview lasting approximately two hours and two to three follow-up interviews each lasting approximately two hours. Each interview will be audio taped. In addition to the interviews eight to ten colleagues will be interviewed about their experiences working with you in education; each interview will be audio taped. Participation will include two to three observations of you in the classroom. In addition, the primary investigator would like access to documents concerning your service in education including course evaluations, promotion portfolio, and classroom materials.

Risks and Benefits: By agreeing to participate in this study, you will help provide insights into understanding how aging workers can find meaning in a second career that serves a social purpose. There are no anticipated risks to participating in this study.

Voluntary Participation: Your participation in the research is completely voluntary. There are no payments or college credits for participating.

Confidentiality: You will be assigned a code number that will be linked to your interview transcript. Your identity will be kept confidential to the extent allowed by law and University policy. The investigator will neither divulge your identity nor your participation in the research. While you may be quoted directly in the resulting research study, you will be attributed anonymously. Contact the researcher directly if you wish to have a copy of the interview transcript.

Right to Withdraw: You are free to refuse to participate in the research and to withdraw from this study at any time. Your decision to withdraw will bring no negative consequences — no penalty to you. You may also choose to withdraw from any particular segment of the study—interview, observation, colleague interviews, or access to documents.

Informed Consent: I, _____, have read the description, including the purpose of the study, the procedures to be used, the potential risks, the confidentiality, as well as the option to withdraw from the study at any time. Each of these items has been explained to me by the investigator. The investigator has answered all of my questions regarding the study, and I believe I understand what is involved. My signature below indicates that I freely agree to participate in this experimental study and that I have received a copy of this agreement from the investigator.

_____ _____
Signature   Date

INFORMED CONSENT

Interviews with Colleagues of the Principle Subject

Title: A Case Study of a Life-long Learner's Encore Career in Education

Researcher(s):	**_Compliance Contact Person_:**
Margaret Voelkel	**Ro Windwalker, Compliance Coordinator**
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Fayetteville, AR 72701	**479-575-2208**
479-575-4875	**irb@uark.edu**

Description: This study will investigate how the life experiences of a retired manufacturing manager helped shape his encore career in education. This qualitative case study will focus on the meaning that the individual makes of his life experiences and how those life experiences are transformed into stories that inform his teaching. Your participation in this study will include an interview lasting approximately 45 minutes. Each interview will be audio taped.

Risks and Benefits: By agreeing to participate in this study, you will help provide insights into understanding how aging workers can find meaning in a second career that serves a social purpose. There are no anticipated risks to participating in this study.

Voluntary Participation: Your participation in the research is completely voluntary. There are no payments or college credits for participating.

Confidentiality: You will be assigned a code number that will be linked to your interview transcript. Your identity will be kept confidential to the extent allowed by law and University policy. The investigator will neither divulge your identity nor your participation in the research. While you may be quoted directly in the resulting research study, you will be attributed

anonymously. Contact the researcher directly if you wish to have a copy of the interview transcript.

Right to Withdraw: You are free to refuse to participate in the research and to withdraw from this study at any time. Your decision to withdraw will bring no negative consequences — no penalty to you.

Informed Consent: I, _____, have read the description, including the purpose of the study, the procedures to be used, the potential risks, the confidentiality, as well as the option to withdraw from the study at any time. Each of these items has been explained to me by the investigator. The investigator has answered all of my questions regarding the study, and I believe I understand what is involved. My signature below indicates that I freely agree to participate in this experimental study and that I have received a copy of this agreement from the investigator.

_____ _____
Signature   Date

APPENDIX B

Participant Demographic Matrix—Colleague Interviews

Pseudonym	Relationship to Hal	Gender	Age	Ethnicity
Calvin	Adjunct faculty member; former full-time faculty member	M	40	White
Jan	Director	F	62	White
Kendall	Full time-faculty member	F	48	White
Peter	Chancellor of the University	M	57	White
TOTAL		F = 2		White = 4
N = 4		M= 2		

APPENDIX C

Interview Protocol Life Story Interview with Primary Participant

Interview Protocol:

A Case Study of a Life-long Learner's Encore Career in Education

Research Question:

How have the life experiences of one retired manufacturing manager shaped his encore teaching career at a regional university?

Purpose Statement:

The purpose of this case study will be to discover how the varied life experiences of a retired manufacturing manager shaped his successful career teaching in workforce development at a regional university.

Rationale for Interviewee:

After a career as a plant manager, the primary subject has staged an encore career as an instructor of leadership, management, and process improvement for working adult students. At age seventy, this individual has turned retirement into a productive second act. This subject's unique experience may provide a model for aging American workers.

This qualitative dissertation will be a case study of one individual's experience of an encore career. According to Creswell (2009), a case study is a strategy of inquiry in which the researcher explores a program, even process, or individual in depth using a variety of data collection procedures. This dissertation will be a case study of an outstanding individual—an "intrinsic case". The study will also include elements of a narrative study but the biographical elements will be bounded by the subject's experience of his second career in education.

Interview Sheet
Life Story Interview with Principle Subject

A Case Study of a Life-long Learner's Encore Career in Education

Time of Interview:	
Date:	
Place:	
Interviewer:	
Interviewee:	

Gender: Male ☐ Female ☐	Age:	

1. Imagine that your life is like a book with chapters. Please divide your life story into its main chapters, Give each chapter a name and provide a brief plot summary for each.

2. Now that you have provided me with a chapter outline and plot summary, I would like you to focus on particular scenes or memories that stand out in the story. We will focus on eight key scenes. First what is the high point of your life story?

    a. What happened?

    b. Who was there?

    c. What were you thinking and feeling?

    d. What does the event say about the meaning of your life?

3. What is the low point of your life story?

    a. What happened?

    b. Who was there?

    c. What were you thinking and feeling?

    d. What does the event say about the meaning of your life?

4. What was a turning point in your life story?

    a. What happened?

b. Who was there?

    c. What were you thinking and feeling?

    d. What does the event say about the meaning of your life?

5. What is your earliest memory?

    a. What happened?

    b. Who was there?

    c. What were you thinking and feeling?

    d. What does the event say about the meaning of your life?

6. Please share a significant childhood scene.

    a. What happened?

    b. Who was there?

    c. What were you thinking and feeling?

    d. What does the event say about the meaning of your life?

7. Please share a significant adolescent scene.

    a. What happened?

    b. Who was there?

    c. What were you thinking and feeling?

    d. What does the event say about the meaning of your life?

8. Please share a significant adult scene.

    a. What happened?

    b. Who was there?

    c. What were you thinking and feeling?

    d. What does the event say about the meaning of your life?

9. Please think back over your life and share one more important scene with me of your own choosing.

    a. What happened?

    b. Who was there?

    c. What were you thinking and feeling?

    d. What does the event say about the meaning of your life?

10. What was your greatest life challenge so far?

11. Describe the characters in the story with the most positive and negative influence on your life now.

12. Please share the important beliefs that believe have shaped your life so far.

13. What do you value?

14. Please share your philosophy of life with me.

15. Looking back on the entire story do you see a central theme?

Rationale for These Questions:

These questions are designed to help the participant reflect on his life experiences and how they have shaped his present encore career in education. This protocol is based on an interview methodology described by McAdams (2006).

<div align="center">

Reference

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McAdams, D.P. (2006). The redemptive self: Stories Americans live by. Oxford: Oxford University Press.

APPENDIX D

Second Semi-Structured Interview with Primary Participant

Questions for Open-Ended Interview regarding Learning

1. You describe yourself as a lifelong learner. What does that term mean to you?

2. You mentioned 3 influential books in your life: *The Paint, Art of War,* and *The Bible.* Can you speak to what you have learned from these books and how you use what you have learned?

3. Are there any other books that have influenced you? If so how? What did you learn?

4. What is the role of learning for a leader?

5. What have been your learning challenges in becoming a teacher?

6. How have you worked to fill any perceived gaps in your knowledge or skills in becoming a teacher?

7. What do you want to learn in the future?

8. What are your current learning projects?

9. How do you learn best?

APPENDIX E

Interview Protocol Colleagues of Primary Participant

Interview Sheet
Interviews with Colleagues of the Principle Subject

A Case Study of a Life-long Learner's Encore Career in Education

Time of Interview:	
Date:	
Place:	
Interviewer:	
Interviewee:	
Gender: Male ☐ Female ☐	Age:

1. Describe your experience working with the principle subject.

2. Please evaluate the principle subject's impact in his role as an instructor and consultant.

3. What benefits does the principle subject bring to the university and to his students?

4. What are some of the negative attributes of the principle subject both for the institution and for students?

5. What are the principle subject's defining characteristics?

6. Please share a story about the principle subject that you feel best illustrates him in his role as an instructor and consultant.

7. Is there anything else you would like to share?

Rationale for These Questions:

These open ended questions are designed to elicit colleagues' descriptions of the principle subject as well as evaluations of his performance as a consultant and teacher.

APPENDIX F

Observation Protocol

Observation Protocol

Date:	
Location:	
Activity:	
Length of Activity	

Descriptions of participants in activity

Descriptive Notes	Reflective Notes

Descriptive Notes	Reflective Notes

Sketch of Physical Surroundings