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IDENTITY WORK FOR “BOOMER” PROFESSIONALS:  
CAREER TRANSITION IN THE RESTRUCTURED ECONOMY

by

JIM BAIRD

Under the Direction of Lesley Reid

ABSTRACT

I conducted a qualitative study, interviewing thirty-three workers from the baby-boomer generation, with an objective of examining the intersection of aging and economic restructuring for boomer professionals. Participants’ careers had been impacted by the restructured economy at a point after they reached the age of forty. I applied an identity theory framework that emphasized meanings associated with growing older in the workforce, changes in the economy, self-meanings, and behavior in the restructured workplace. My focus also included process and questions of structure and agency.

I used grounded theory methods to provide theory that explains the experience of transitioning from an existing work role as a downsized worker seeking a new job, entering self-employment, or pursuing a reinvention of one’s career. I examine the transition process, the

effects of structure, the formation and maintenance of identity in the transition role, and the factors that impact transition outcomes.

I propose a theoretical argument that provides a comprehensive framework for the transition process. I establish transition as a relatively new and legitimate role for today's worker, identify hegemonic structure as being particularly influential in the development of transition role identities, conceptualize personal resources—specifically self-esteem, self-efficacy, and authenticity—as key aspects of maintaining identity during transition, and investigate worker attributes that relate to transition outcomes. I assess career outcomes in terms of how successfully the transition role is negotiated and identify characteristics that comprise successful and unsuccessful transitions. I then discuss the implications of unabated economic restructuring for boomer professionals and, more broadly, for the future of the U.S. economy.

**INDEX WORDS:** Economic restructuring, Aging, Identity theory, Ideology, Hegemony, Work transitions, Transition role identities, Personal resources, Careers, Self-esteem, Self-efficacy, Authenticity, Downsizing, Workplace restructuring

IDENTITY WORK FOR “BOOMER” PROFESSIONALS:  
CAREER TRANSITION IN THE RESTRUCTURED ECONOMY

by

JIM BAIRD

A Dissertation Submitted in Partial Fulfillment of the Requirements for the Degree of

Doctor of Philosophy

in the College of Arts and Sciences

Georgia State University

2009

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2009

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Georgia State University  
December 2009

## **DEDICATION**

This dissertation is dedicated to generations, past and future, who have inspired education, or may become inspired to seek the power of education. As I write this I am awed by those who have personally inspired me: Helen Bowman Baird, who instilled in me a love for learning long before I entered a classroom; George James Baird, who, by becoming a Pharmacist, convinced me that education was something that I could attain, even though we missed crossing paths by exactly six months; Jean Audrey Baird, the reason I'm "walking" and proud of it (I hope somehow you know); Stanley Bowman Baird, who made me believe I could be what I wanted to be; Jean Butler Dean, who gave me so much more than great office furnishings and the best room in the house in which to write; and Laurie Dean Baird, who always encouraged the path that I was on. And to those who I hope to provide some small amount of inspiration: Ava Ciaran Baird and to those who are sure to follow.

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## **CHAPTER 1 - INTRODUCTION**

A 60 year old ex-Human Resources director who has been working on a contract basis has cosmetic surgery, thinking that a face-lift will enhance her job search in what she perceives as a youth-oriented corporate culture. A 56 year-old technology manager, displaced from the shrinking ranks of the telecommunications industry due to a merger, swears she will never rejoin the corporate world, even if it means selling her dream retirement house. In contrast, a downsized executive, still in his 40s, doggedly attempts to resume his career trajectory, refusing to accept that having lost his job nearly two years ago will deter his CEO ambitions. A 54 year-old advertising executive risks losing her house in order to fund the technology start-up that she believes she is uniquely positioned to found. Each of these older workers is coping with changes in the workplace that have affected their careers and altered his or her behavior in the workplace.

### **The Intersection of Economic Restructuring and Aging**

Two phenomena are occurring in today's workplace that are affecting the lives of older workers. First, economic restructuring, a collective set of responses to an increasingly competitive global economy beginning in the 1970s, continues to change the way that business is conducted, the labor processes involved, and the nature of careers. Downsizing, outsourcing, mergers and acquisitions, and reengineering have become common practices in contemporary corporations. As a result, today, jobs and career trajectories, in fact, the very nature of work, are quite different from those that workers experienced prior to economic restructuring (Capelli et al. 1997; Osterman 1999).

Second, occurring simultaneously, the workforce is aging, currently being comprised of increasingly higher proportions of older workers. The baby-boom generation, consisting of 77 million people born between 1946 and 1964, has now aged to the point where the youngest

boomers are 44 years old. The oldest are 63. The entire boomer population is of working age, over the age of 40, yet younger than the traditional retirement age of 65. Consequently, boomers comprise the largest segment of today's workforce (Croker 2007; GAO 2001). However, boomer workers represent a compelling area of sociological study for reasons beyond the magnitude of their numbers. On one hand, for several reasons they are likely to be marginalized in today's workplace (Bridges 2001; Sicker 2002). On the other hand, their history indicates that they are a cohort that has the potential to leave a unique mark on workforce aging (Dychtwald 1999; Freedman 1999).

## **The Boomer Duality in the Workplace**

### ***Marginalization of Older Workers***

As a result of economic restructuring and aging, older workers may become marginalized due to changes in the workplace or discrimination on the basis of age. In the workplace, careers have changed over the course of older workers' years in the workforce. The traditional career, typically involving a long-term reciprocal employer-employee relationship, has become less common during the last 25 years. Today, as economic restructuring has rapidly reshaped business practices, many employers have abandoned the implicit contract that previously formed the basis for long-term careers with a single-employer. Employers can and do end employment "at will." The responsibility for sustaining a career has shifted from employers to the employee (Capelli et al. 1997; Rubin 1996; Smith 1998). DiTomaso (2001: 250) argues that "even full-time workers are contingent in that employers increasingly want their employees to act as if they are [entrepreneurs]" who must continually demonstrate their value to the company.

Changes in career relationships can compromise the position of older workers in significant ways. For instance, careers operate differently than they did when these workers first

entered the workforce and “learned the ropes.” The rules have changed and many older workers are not prepared to compete for jobs under the new set of business practices. Often their only experience is with long-standing careers under the traditional employment relationship. In addition, new forms of employer-employee relationships have replaced the traditional relationship. For example, contract work, where the employer assumes no responsibility for the employee beyond paying the contract, has become more common (Barker and Christenson 1998; Smith 1997). Sometimes employees can sell their services to their former employer under a contract arrangement; however, in order to do so, the employees must learn to navigate within a completely new work arrangement. Other work arrangements, contingent on the availability of short-term work, have surfaced in the restructured economy. These alternative work situations may negatively affect older workers if they are slow to embrace the new arrangements. In a broader sense, today’s restructured workplace is filled with change. Older workers may resist change or be less proficient at adapting to rapidly changing conditions. Age may limit older workers’ ability or willingness to adopt workplace and labor process changes. They are faced with dramatic workplace change, set in the context of a corporate youth-culture, at a time in their lives when they may be least able to manage change (Bradbury 2005; Capelli 1997; Moyers and Coleman 2004; Rubin 1996; Sicker 2002; Sterns and Miklos 1995).

In addition to workplace restructuring, older workers are susceptible to age discrimination (Nelson 2002; Palmore 1999). Although workers over the age of 40 are legally protected from discrimination on the basis of age, they are, in reality, particularly vulnerable to two age related situations.<sup>1</sup> First, a fundamental tenet of past employer-employee relationships rewarded seniority with higher salaries. Those with less tenure accepted lower pay on the

---

<sup>1</sup> The ADEA of 1986 makes it illegal to discriminate against a worker over 40 on the basis of age, stereotypes related to age, or perceptions related to abilities, physical qualities, or performance (Sterns and Miklos 1995). Mandatory retirement on the basis of age is also prohibited except in special circumstances (Palmore 1999).

assumption that they would earn more as they gained experience. Now, in the era of restructuring, those who have benefited from this implicit arrangement have higher salaries and are the target of cost cutting measures as a result. As Budros (1997: 231) notes, firms “can lower costs quickly...by eliminating their expensive personnel.” Companies can achieve more substantial cost savings by downsizing higher paid older workers than by reducing younger workers (Sicker 2002). Second, older workers can get caught in a vicious cycle that limits their value to the company. Often they do not get training that they need because managers are reluctant to invest in training expenses for workers who are close to retirement or perceived to lack long-term potential. When they do not get the training they need, they consequently do not get the most important assignments, causing their worth to the company to decline (Sterns and Miklos 1994).

In addition to the vulnerabilities of older workers that originate with workplace restructuring and those resulting from age discrimination, there is also a cumulative effect between the two situations. Older workers are perceived as being slower to adapt to change (Palmore 1999). As a result, being an older worker in the rapidly changing era of economic restructuring is “double jeopardy.” Further, company management may feel that their perceptions, even though rooted in age discrimination, are justified in today’s highly competitive business environment.

As a consequence of workplace change and ageism older workers are disproportionately affected by economic restructuring. Compared to younger workers, the career trajectory of older workers is more likely to be interrupted or redirected by downsizing. Older workers also take longer to find reemployment and they are particularly susceptible to lapses in job-related benefits such as health insurance and pensions (Bridges 2001; Sicker 2002). As a result, they are

increasingly involved in work arrangements that differ from the traditional long-term reciprocal employer-employee relationship. Short-term contingent employment, underemployment, self-employment, and unemployment have become more common work situations for older workers. The net effect is that a large, proportionately increasing, segment of the workforce is potentially vulnerable to the combined effects of economic restructuring and aging (Calasanti and Bonanno 1992; Sicker 2002; Sum and Fogg 1990).

### ***Boomer Agency in the Workplace***

The potential susceptibility of the boomer cohort to being marginalized in the workforce contrasts with the lived experience of many boomers and with the impact that the cohort has had socially, politically, and economically. They are the generation that ignited the sexual revolution in the late 1960s. They began social movements that resulted in the end of the war in Vietnam, initiated the mid-1960s civil rights movement, and advanced the women's rights movement during the same timeframe. Economically, many boomers achieved unprecedented standards of living and most have experienced a lifetime of perceived prosperity. Technological advances and improved medical care have improved their quality of life and greatly increased their life expectancy. Instead of being marginalized, many boomers have experienced just the opposite, in many respects having their way in the world. Arguably they are not going to easily accept a diminished role in the workforce, much less a compromised role.

Their efficacy in negotiating the intersection of economic restructuring and aging is yet to be determined. However, the potential, based on the past accomplishments of their generation and proportion of the workforce that they represent raises a sociological question of structure and agency. Clearly, there are significant structural forces involved in both economic restructuring and aging. Other structure has arisen based on the expectation that boomers have a significant

impact on their social environment, perhaps opposing the potential for marginalization of this cohort.

Older workers are susceptible to the structural effects of aging and economic restructuring; the reality of biological aging and structural patterns in the workplace that originated with changes in the global economy. They are also constrained by the discourse of restructuring, which rhetorically frames the changes in a positive light, one that enables companies to take whatever steps are necessary to increase efficiency and profits and to compete. Workers are compelled to accept new “organizational forms and hierarchies, as well as new types and principles of employment (e.g., more temporary and contractual, rather than full-time with benefits)” (Hirsch and De Soucey 2006: 173). Less job security and fewer opportunities for traditional employment have become entrenched in the public mindset where these ideas further contribute to the structure that largely defines economic restructuring (Cornfield, Campbell, and McGammon 2001; Smith 1997). Similar processes create structure associated with aging as society develops expectations in the form of shared meanings that define aging norms.

Underlying patterns occurring in the economy and in the aging process emerge along a macro-micro continuum that also can be viewed as hierarchical. At the highest level of abstraction, social constraints emerge at a societal or cultural level, such as institutional structure that arises from the economy or the political arena. Higher order structure is also reflected, at a slightly lower level, in organizations such as companies, banks, and government agencies. Not only do these organizations reflect more abstract economic and political patterns, they impose additional constraints at the organizational level. Groups form in organizations and within social networks, such as departments or coworkers who associate together, that also influence generalized societal expectations and form social structure that limits social behavior. Further, as

individuals adopt higher order structure and develop intersubjective meanings through social interaction, they become part of the process of generating normative patterns, further imposing boundaries on acceptable behavior (Stryker 1980). Normative structure develops at the institutional, organizational, group, and individual level as workers accept these shared meanings by objectifying them as “structures.”

For example, a firm decides to send manufacturing jobs currently in their U.S. operations to an overseas location. Wall Street applauds the decision and stock prices rise. The CEO speaks from company headquarters in a video-taped speech explaining the decision. All employees view the video in local meetings where their direct management further justifies the decision. Employees then participate in several small group or individual discussions where they mull over the decision. At the end of the day, a consensus of shared meanings has taken shape that views the decision to send work off-shore as a necessary evil in today’s competitive world. Structure that emerges at several levels—Wall Street, corporate headquarters, local company management, coworker meetings, and discussions with respected associates—largely determines how individuals perceive and respond to this important restructuring decision.

In many ways older workers are limited by structure, often accepting work arrangements for which they are ill-prepared and from which they have no recourse. The structural constraints associated with aging and economic restructuring are very powerful determinants of work outcomes for older workers. However, structure affecting older workers also involves a positive influence on outcomes. Many workers have experienced substantial success over the course of their careers and confidence in continued positive outcomes is ingrained in their thinking. Older workers have a history of being motivated and hard-working and a strong work ethic is firmly entrenched as a core value that transcends individual attitudes toward work (Bernstein 1997).

The work ethic that older workers share will not easily be compromised by structural marginalization (Croker 2007; Freedman 1999). Structure affecting older workers entails countervailing forces that suggest both vulnerability and resistance to marginalization.

Further, it is also possible that older workers exhibit individual agency in defining their age and work identity. Forces that result in older workers' vulnerability may be accompanied by counteracting effects that result in proactive older workers who individually resist being marginalized. Individual agency, although likely much less powerful than structural forces, must also be considered in examining boomers in the era of economic restructuring (Mead 1934; Reitzes and Mutran 2002; Stryker 1980; Turner 1962; Tsushima and Burke 1999).

Boomers have a history of creating significant cultural change throughout their life course (Dychtwald 1999; Freedman 1999). Scholars suggest that they are redefining aging by adopting more youthful age identities than their chronological age (Kaufman and Elder 2002; Logan, Ward, and Spitze 1992).<sup>2</sup> Might they have a similar impact in the workforce? What effect do older workers have on workplace change as the result of individual agency? How does agency arise within the confines of structure and what are the processes by which it develops? The dialectical forces of structure and agency are central to my investigation of the effects of economic restructuring and aging on boomer workers.

### **Statement of Purpose**

Understanding how economic restructuring and aging relate to boomer workers involves investigating the ways that they are susceptible to being marginalized and how they respond to these vulnerabilities. Fundamental issues of structure and agency frame this study as boomer workers face structural constraints of economic restructuring and aging that conflict with past experiences in which they have been influential in determining life outcomes. Further, the

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<sup>2</sup> Other generations may be redefining aging as well, but research has focused more on the boomer generation.



dynamic nature of change in the workplace suggests the importance of investigating process in the response of boomer workers to these changes. Of course, boomer worker situations vary and issues of marginalization, agency, and process need to be contextualized in terms of specific career outcomes. Broadly stated, then, the purpose of my research is to examine the intersection of economic restructuring and aging by studying boomer workers with an emphasis on these key considerations.

Studying the intersection of aging and work involves four key issues. First, what are the implications of the combined effects of economic restructuring and aging on boomer workers' behavior? That is, how are these workers' actions in the workplace a manifestation of the effects of economic and workplace change and a result of growing older? Second, what are the associated structural effects that affect boomer workers and to what extent are these forces perceived as constraining? What effects, if any, originate with individual agency and influence workplace restructuring and perceptions of age in the workplace? Third, because work in the era of economic restructuring is fluid and dynamic, what processes contribute to the structural and agentive outcomes for older workers in the workplace? Where does structure originate and how does it limit boomer outcomes in the workplace? How does agency take shape and what processes guide the interplay of structure and agency? Fourth, how do these phenomena compare and contrast across various work situations encountered by older workers as the result of the intersection of aging and economic restructuring? My goal, then, was to conduct research that addresses these relatively abstract issues.

### **Introduction of Theory**

Symbolic interactionism has traditionally generated ideas and research dealing with issues such as situational social behavior, agency, and interaction processes. However, the

perspective was largely limited to the micro-level with minimal conception of structure, particularly higher-order structure.<sup>3</sup> As Stets (2006: 88) notes, “The traditional symbolic interactionist perspective, the situational approach, sees society as always in the process of being created through the interpretations and definitions of actors in situations (Blumer 1969).” Stryker (1980) developed structural symbolic interactionism to conceptualize a more constrained approach to symbolic interactionism that accounts for higher order social structure. He envisions a fluid and dynamic process that emphasizes role identities (self-meanings) that are largely the product of societal expectations. These expectations, as perceived by a reflexive self, in turn dictate individual behavior. Stryker’s work comprises one of two foundational perspectives of identity theory. Burke developed the other perspective, which focuses on “the internal dynamics of self-processes as these affect social behavior” (Stryker and Burke 2000: 285). Burke’s version of identity theory posits mechanisms for identity change in response to both structure and agency (Burke 2006; Tsushima and Burke 1999). Role identities provide a key concept for connecting macro- and micro-level processes in identity theory, establishing a symbolic interactionism that theoretically links individuals with social structure (House and Mortimer 1990; Howard 1994; LaRossa and Reitzes 1993).

Meanings are central to symbolic interactionism and identity theory. Blumer (1969) outlines their importance as fundamental assumptions of symbolic interactionism as follows: (1) human beings act on the basis of meanings, (2) meanings occur as the result of interaction, and (3) meanings are managed by individuals using an interpretive process. In other words, behavior is based on an individual’s interpretation of meanings that result from social interaction.

Interpreted meanings and their underlying dimensions, therefore, form the basis for

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<sup>3</sup> Blumer’s (1969) formative work addressed larger social processes, however the majority of the early work in symbolic interactionism focused on the micro-level.

understanding human behavior and identity and are central to my research as a result (Stryker 1980).

Identity theory emphasizes the extent to which these meanings are learned through social interaction. Further, because groups are formed and maintained via social structure, individuals develop a system of shared meanings that are the product of social structure. Interactions are both the means and the result of social structure and meanings attached to symbolic interactions are the key to understanding an individual's identity and behavior. Structure broadly determines shared meanings, including meanings that are attached to oneself. The self is conceived as self-meanings associated with a set of role identities in identity theory. Cast (2003: 43) describes identity as "a set of meanings applied to the self in a social role or situation, defining what it means to be who one is in that role or situation" (Burke and Tully 1977; Stryker 1980). These self-meanings or identity largely determine behavior (Stryker 1980: 70).

Stryker's (1980) conception of identity theory, also known as structural symbolic interactionism, addresses social structure in more detail than traditional symbolic interactionism. He conceives of a hierarchical view of structure in which higher order structure constrains lower levels of structure. The effect of structure cascades from one level to the next, but new forms of structure emerge at each level. That is, there is a cumulative effect of higher order structure as well as an emergent effect. At the lowest level, the individual, meanings associated with structure emerge that are informed by all of the higher order structure that the individual is directly, or indirectly, exposed to.

As exemplified by Stryker's fluid and dynamic view of structure and Burke's control system approach to identity maintenance, identity theory places a strong emphasis on *process*. The overarching process in identity theory borrows from Mead's (1934) notion that society

determines self and self determines behavior (Stryker and Burke 2000: 285). Stryker and Burke develop new concepts, which I introduce later, to formalize this linkage and to make it more measurable; however the connection between society and behavior, mediated by identities (self) is central to identity theory. Identity theory specifically links social structure with behavior.

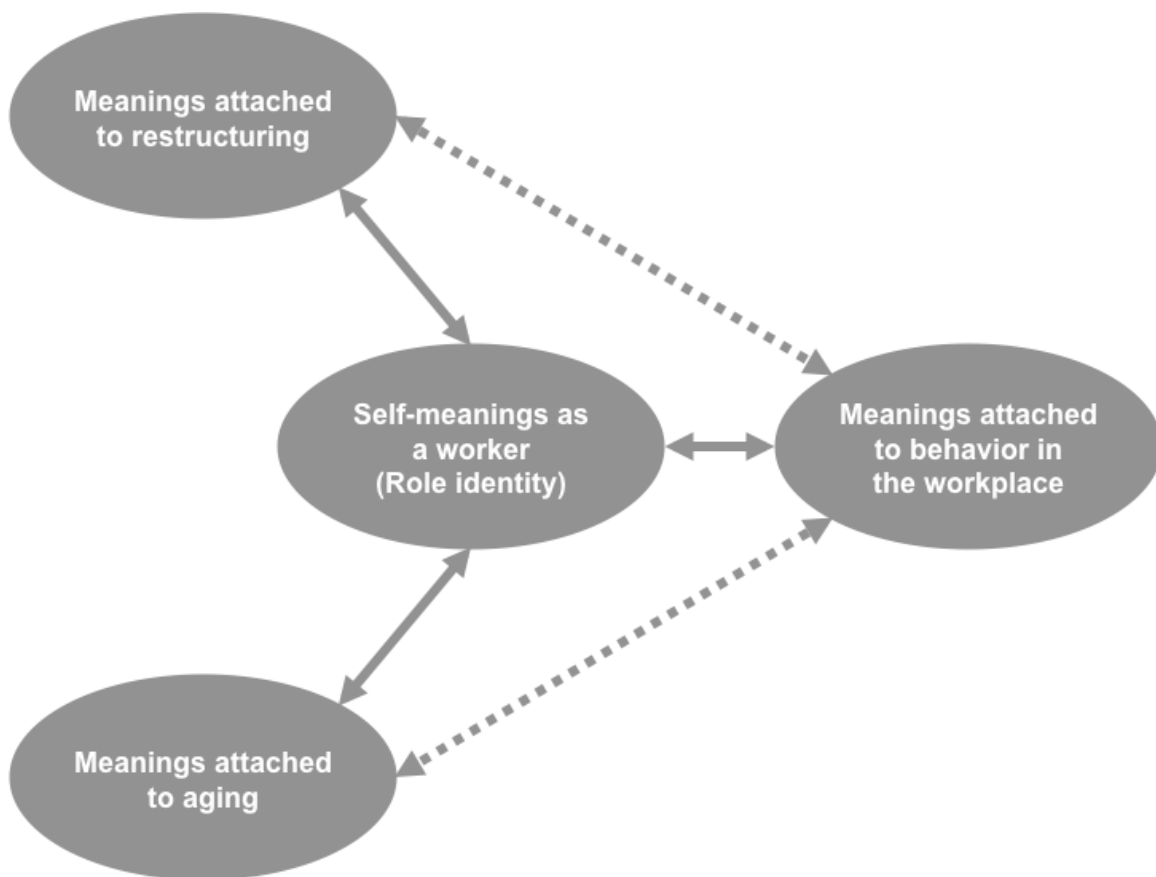
## **Introduction of Methods**

Understanding how older workers behave in response to aging and economic restructuring defined my primary research objective. Doing so sheds light on their outcomes in the restructured workplace, how they cope with vulnerabilities associated with aging and restructuring, and to what extent they resist being marginalized. What little research that has been conducted in this area has generally focused on low-skilled or blue-collar workers. These studies have generally emphasized worker attitudes which have not necessarily translated into actions and have often treated workers as a homogenous group with respect to age and work situation (Broschak, Davis-Blake, and Block 2008; Smith 1997). Given that economic restructuring (and likely aging) affects classes of workers differently, I examined professionals as a group that has been understudied. Given that age groups are expected to be differentially affected by restructuring, I studied baby boomers, currently the largest and fastest growing segment of the labor force (Little and Triest 2002). Given that work attitudes have not been shown to translate into work behavior (Broschak et al 2008), I emphasized meanings that have been shown to influence behavior (LaRossa and Reitzes 1993; Stryker 1980). Given that workers in different work arrangements experience work dissimilarly (Smith 1997), I investigated five categories of work situations, those that are comprised of workers who I classify as: Traditionals, Transitionals, Reinventors, Independents, and Contingents. My research, then, addressed several inadequacies in the literature.

I related meanings that boomer professionals associate with structure, particularly restructuring and aging, to their situational behavior in specific work arrangements. To do so, I interpreted the meanings that worker's verbalized in association with restructuring and aging. Qualitative research and in-depth interviews in particular, are well-suited to investigating this interpretive process. Therefore, using identity theory as a conceptual framework, I conducted 33 in-depth interviews of individual workers, examining their experiences in the workplace during the era of economic restructuring. I focused on professional workers from the baby-boomer generation. They are a segment of the workforce that is broadly affected by restructuring (Doeringer 1990; Ehrenreich 2001; Fraser 2001; Kaufman 1982; Leventman 1981; Rudolph 1998), are the fastest growing group of older workers in the workforce (Toossi 2002), and are a cohort that has demonstrated the potential to exhibit individual agency in the past (Crocker 2007; Dychtwald 1999).

I examined the relationships between meanings attached to different aspects of work as shown in Figure 1.1. How do meanings associated with restructuring and meanings associated with aging relate to individual boomer professional's self-meanings (role identity) as a worker? How do these restructuring and aging meanings relate to their behavior in their particular role as worker? How do self-meanings as a worker relate to behavior in their work? How does behavior in the workplace affect workers' role identity? The relationships between meanings, which added depth to my study within an identity theory framework, are depicted with bi-directional arrows in Figure 1.1. The solid lines indicated primary relationships and the dotted lines suggest less direct relationships. These meaning relationships correspond broadly to symbolic interactionism's relation between society and behavior as mediated by self (identities). My interviews focused on teasing out these aspects of meaning and my analysis focused on how the meanings interrelate.

I performed a qualitative analysis using in-depth interviews of boomer professionals to examine perceptions of aging and restructuring, the relationship between these perceptions and individual worker identity, and between worker behavior in various categories of work situations. In addition to expanding an understanding of older workers in the restructured workplace, I assessed the relative effects of structure and agency that are involved, and investigated the processes involved in this contemporary social issue. In doing so, I strived to extend identity theory and add valuable theoretical insight into the sociology of work.



**Figure 1.1 Relational Model Overview**

## **CHAPTER 2 - ECONOMIC AND WORKPLACE RESTRUCTURING**

All workers are affected, to varying degrees, by the fundamental changes in work that are impacting boomers. Much has been written about the origins and impacts of economic and workplace changes under several different labels: Harvey (1990) writes of flexible accumulation in postmodernity, Halal (1986) and Bell (1973) of post-industrialism, Osterman (1999) of workplace transformation, Cappelli (1997) of corporate restructuring, Bluestone and Harrison (1982) of deindustrialization, and Cornfield et al. (2001) of workplace restructuring. Generally, the changes are conceived as originating from an altered economy and economic restructuring is a common multi-disciplinary term that captures many of these ideas. Globalization is central to most explanations of economic restructuring, specifically global competition and shifts in global economic power. Economic and political responses to globalization—what Budros (1997: 229) calls “distinctive institutional features,” such as international competitiveness, industry deregulation, institutional investment, and changing technology—constitute the substance of economic restructuring. The implications of economic restructuring, “corollary organizational features,” occur in organizations such as companies, banks, and investment firms. In corporations, the workplace has been restructured. As Osterman (1999:21) observes, “the rules that structure work have been transformed.” Both economic changes and changes in the structure of work are important elements affecting experiences in the workplace.

My principal interest is the changes that have occurred in the workplace, which Cornfield et al. (2001) refer to collectively as “workplace restructuring.” Changes in the labor process (Braverman 1974; Edwards 1979; Wardell, Steiger, and Meiksins 1999), internal labor markets (Cappelli 1997; Doeringer and Piore 1971; Rubin 1996), and work structures (Cornfield et al. 2001; Kalleberg and Berg 1987; Smith 1998) offer useful concepts for discussing workplace

restructuring. Broader theories such as segmented labor markets (Doeringer and Piore 1971; Gordon 1972), and dual economies (Averitt 1968; Kalleberg, Wallace, and Althausen 1981) also inform an understanding of the changes occurring in the workplace (Reid and Rubin 2003). Ultimately, however, workplace change is reflected in the meanings and lived experience of today's workers (Kalleberg 1989; Simpson 1989). Therefore, in this section, I review economic restructuring and workplace restructuring, using the broader term "restructuring" to refer to the overall changes that have occurred as a result of globalization.

Figure 2.1 illustrates a conceptual overview of economic and workplace restructuring. Restructuring began with economic changes in global structure and a corresponding set of political and business strategies in response to the altered economy. *Economic restructuring*, then, consists of high-level *economic changes* as well as *institutional strategic responses* to the changing economy. These broad economic changes are depicted in the figure as two key aspects of economic restructuring, represent the driving forces propelling the restructured economy. These macro-level economic changes were followed by general organizational tactics that dealt with the changes and specific adaptations that resulted within the labor process. The figure shows *organizational tactics* and consequential *workplace changes* that constitute the core of *workplace restructuring*.

For example, beginning in the 1970s, broad global economic changes occurred due to Japanese competition. This competition created awareness among U.S. companies of Japanese manufacturing techniques that emphasized flexibility and the elimination of waste by using just-in-time (JIT) manufacturing and total quality control (TQC). Smith (1997: 320) explains, "The goal of just-in-time inventory (JIT) systems in manufacturing is to achieve flexibility by minimizing parts, materials, and resources on hand, cutting back and eliminating waste, and



improving product quality.” To compete, U.S. businesses embarked on a strategy of copying Japanese JIT/TQC methods.

By tactically implementing JIT/TQC in the workplace, businesses were able to dramatically alter the material planning and control aspects of the labor process. The need to plan ahead for parts was greatly reduced and often shifted from the company producing end-products to the company supplying parts. U.S. companies typically laid off the excess workers who were no longer needed because of the new techniques, implementing downsizing as a specific tactic in response to Japanese competition and JIT/TQC. Further, decision-making moved closer to the point of manufacture in a JIT/TQC environment. A worker on the assembly line could now make a decision on what parts were needed without the need of a material planner or a material control manager. As a result of such changes in the labor process, a general trend developed toward flattened organizational hierarchies in the workplace (Leicht 1998). This example illustrates the levels of restructuring depicted in Figure 2.1: (1) the *economic changes* brought by Japanese competition, (2) the *institutional strategic* response for U.S. companies to become more cost-competitive by emulating Japanese manufacturing techniques, (3) the *organizational tactic* to reduce waste and improve flexibility by instituting JIT/TQC techniques and to downsize excess workers, and (4) *workplace change*, in the form of flattened organizational hierarchies, that resulted from this tactical implementation. Individual workers are affected by the cumulative effect of changes occurring at each of the levels of restructuring. I review each level of restructuring in the following sections in order to delineate the implications of restructuring for the individual worker. Each of the next four sections corresponds to an aspect of restructuring shown in Figure 2.1. Taken together, *economic changes* and *institutional strategic responses*

comprise *economic restructuring* and *organizational tactics* and *workplace changes* comprise *workplace restructuring*.

## **Economic Restructuring**

### ***Economic Changes***

Transformations in the way we work are not new; work has been changing since the division of labor emerged and work was separated from the home (Durkheim 1984). Since the industrial revolution, capitalist economies and work in labor markets have been tightly linked. In labor markets, the nature of work has been highly contested, shaped by opposing efforts to control work conditions (Braverman 1974; Edwards 1979). Capitalists, motivated by profits, seek to maximize the labor power that they receive from their employees. Employees, selling their labor power, seek income and working conditions that they consider fair. This essential struggle has been waged since the beginning of industrialization and has been a major factor creating change in the world of work. Yet social scientists from multiple disciplines agree that the transformations that have occurred during the last quarter century signal a new era of restructuring (Cappelli et al. 1997; Cornfield et al. 2001; Harvey 1990; Osterman 1999; Sicker 2002). What is it that is so different?

Rifkin (1995: 3) alludes to a fundamental change in the social interaction that defines the labor market, the labor process, and paid work in general. He notes that “now, for the first time, human labor is being systematically eliminated from the production process.” Labor reductions are occurring in all aspects of business. The ties between employers and employees are weakening as a general decoupling of the employer-employee relationship has occurred (Rubin 1996). Rifkin, however, suggests a more fundamental decoupling of labor and the economy as capitalists rely less on labor to generate profits. Alternatively, in a Marxist perspective, profits

remain dependent on labor, but following the capitalist imperative, new ways have been developed to exploit labor. Rather than a decoupling of labor and economy, changes have occurred in the way that surplus labor powers the economy. Fewer workers are necessary to produce profits, but workers who remain in the labor market are exploited differently from workers of the past (Edwards 1979; Steiger 1999). Both perspectives have merit, but do not fully capture the centrality of globalization to restructuring. While I am primarily interested in restructuring from the U.S. perspective, the global nature of economic restructuring is essential to understanding the impacts of the changes that have occurred in the U.S. workplace.

In the most general sense, as shown on the left hand side of Figure 2.1, economic restructuring, is a broad set of capitalist responses to increased global competition, OPEC asserting control of the oil commodity, productivity and technology advances, and government deregulation (Capelli et al. 1997; Osterman 1999). These economic changes may have begun as early as 1956 when the number of manufacturing sector jobs first dropped below 50 percent of U.S. jobs (Toffler and Toffler 2006). However, most scholars point to more recent events. Logan and Swantrom (1990) suggest that there is a consensus on the beginning of the current period of economic restructuring as initiating with the 1973 oil crisis. This theory, attributable to David Harvey (1990), is that OPEC created a capitalist crisis by shifting control of the oil commodity. Prior to OPEC maneuvering at the end of the October War, Western industrial economies that produced end-products primarily controlled the resources necessary for production, including oil. Before the October War, Western oil companies determined the quantity and pricing of oil shipments from the Middle East. Although the war was of little consequence militarily, it created a dramatic economic change. OPEC exerted a newfound power by nearly quadrupling the price of oil between October and December 1973. In retrospect, the shock was not the price increases,

but the establishment of a group of ex-colonial, third world countries as powerful players on the world's economic stage. The balance of power shifted, serving notice to the world, perhaps more clearly than ever before, that the economy was now a global phenomenon (Boyne 2002; Yergin 1990; Fainstein and Fainstein 1989).

If the signals of change from the Middle East were not clear enough, further affirmation came from the Far East. Japan, by surpassing previous quality levels with improved products, began to successfully penetrate U.S. markets. Japan's Gross National Product increased from one-third that of France in 1952 to as large as the United Kingdom's and France's combined, and half that of America's, by the late 1970s (Shienbaum 2002). In terms of goods and services produced per person, Japan grew four times faster than the United States from 1960 to 1973 and five times faster from 1973 to 1988. Market competition developed rapidly, putting the United States in the unaccustomed position of being economically challenged (Korten 1995; Rubin 1996). Economic power and influence, formerly centered in the industrial West, was now being spread around the globe (Harvey 1990; Rubin 1996).

### ***Institutional Strategic Responses***

Figure 2.1 further depicts that institutional changes also occurred at broad levels (e.g., the political arena) in response to economic restructuring, but were strategic responses to changes that originally began within the economy. For example, politically, strategic responses were aimed at making U.S. industry more competitive. Four of these institutional phenomena are explored in this section: deregulation, technology advances, institutional investments, and business strategies (that transcended individual companies).

## Deregulation

The Reagan administration's response to a diminished U.S. competitive position was a policy of regulatory reform. Reagan's election "ushered in a concerted and highly successful effort to roll back the clock on the social and economic reforms that had created the broadly based [post World War II] prosperity ... and to create a global economy that was more responsive to U.S. corporate interests" (Korten 1995:63). The general thrust of Reagan policy was to release business and property from "any potential threats to profitability [including] decreasing environmental regulation, work and safety protections, and spending associated with welfare" (Rubin 1996:117). Shienbaum (2002: 70) describes the shift as one from regulatory capitalism to entrepreneurial capitalism. Political and legal changes refocused the corporate mentality more directly on the bottom line. Gone was any sense that the protection offered by incorporation included an obligation to the state and its people. Economic performance, primarily profitability and growth, became the only criteria for gauging success (Budros 1997; Korten 1995; Rubin 1996; Shienbaum 2002).

## Enabling Technology and Institutional Investment

The trend toward what seems a particularly ruthless form of capitalism has been aided by two catalysts that accelerate the pace of restructuring. First, technology advances in computing (PCs, software) and communication (the Internet, cellphones, GPS) enable waste elimination, distributed decision making, and productivity improvements in general (Zuboff 1988). Technology is so intertwined with restructuring that it is difficult to separate the two. Head (2003) offers an account of economic restructuring in which information technology (IT) is the central force. In contrast, Cornfield et al. (2001) do not emphasize technology as a separate factor in economic restructuring. For purposes of this study, I envision technology as a separate

phenomenon, but as an enabler of, or catalyst for, restructuring. Technology has resulted in the effects of restructuring occurring much faster than they would have without the advances in technology that have taken place (Zuboff 1988).

Second, the investment community, as symbolized by Wall Street, has had a dramatic effect on restructuring. Beginning in the 1980s, buoyed by the advent of mutual funds, institutional investments became a more powerful force in setting expectations for corporate financial performance (Useem 1993). Ironically, mutual funds experienced significant growth as a result of 401k plans that were motivated by a desire by companies to reduce their pension obligations. Short-term financial results are crucial to selling mutual funds and pressure from institutional investors added another incentive for companies to embrace restructuring (Drucker 1993; Piore and Sabel 1984). Where investors were previously satisfied with long term growth and dividends, the emphasis is now on short-term growth and meeting quarter-to-quarter profitability projections. As DiTomaso (2001: 249) notes, “The rise of *investor capitalism* has changed the face of corporate governance...by forcing companies into a shorter time perspective.” Faster communication and the media also contribute to the immediacy of financial performance. Downsizing and consolidation through mergers and acquisitions are generally positively rewarded by Wall Street and the investment community (Budros 1997; Useem 1993). Negative performance from individual companies, as well as larger scale “failures,” such as the 2001 recession and the dot.com bubble burst, greatly intensify pressure. This pressure has escalated beginning in 2008 due to the banking crisis and the dramatic decline in the Dow Jones Industrial Average. This Wall Street effect influences the extent of restructuring, contributes to sustaining the implementation of restructuring strategies and tactics, and increases the speed at which restructuring changes are made. Like technology, institutional investment is a separate,

but intertwined, effect from restructuring that has acted as a catalyst, accelerating the pace of restructuring.

### Business Strategies

Economic restructuring includes the cumulative effects of increased competition, globalization, deregulation, rapidly changing technology, and the pressures of institutional investment. These were the new external economic realities that companies faced, beginning in the 1970s and 1980s. The response of the corporate world to these realities, beyond adopting technology where there was a favorable return on investment and being sensitive to investor pressure, was initially more tactical than strategic. One of the few collective strategies, embraced across the Fortune 500, was to emulate Japanese production techniques. This ad hoc strategy led to many of the specific tactics used by firms in the early years of the economic restructuring era.

Company strategies in response to economic restructuring went well beyond mirroring Japanese production techniques. Unlike Japanese companies, in which employer-employee relations were characterized by lifetime employment, U.S. companies took the opposite approach. In the United States, implicit contracts had defined the employer-employee relationship since World War II, with some mutual benefit to both parties. Companies kept workers with intimate knowledge of the firm's business on salary during times where demand fluctuated. Employees gained through job security while employers protected workers with valuable expertise from the competition. Employers were generally in a position to take advantage of an economic upturn as a result. Loyalty was based on a quid pro quo between employer and employee. An unwritten system was in place that rewarded long-term employment with higher salaries later in a worker's career (Capelli et al. 1997; Rubin 1996). Companies rethought the implied employment contract as a response to economic restructuring, and, to a

large extent, abandoned the implied commitment (Kalleberg 2000). At will employment became the norm during the era of restructuring (Gordon 1996; Smith 1998). Older workers, particularly, who had expectations of higher late career salaries and a pension at retirement were suddenly forced to deal with an altered reality. Because of their higher salaries, older workers were often targeted for reductions-in-force (Budros 1997; Sicker 2002). The era of economic restructuring legitimized such strategies that would have been unthinkable just a few years earlier

Another strategy that companies reevaluated was vertical integration. Traditionally, companies performed functions critical to their business in their own facilities with their own employees. They vertically integrated functions, such as part manufacturing, tool making, and maintenance, into their company so they could control their entire business process. With restructuring, this idea changed to one of focusing on core competencies and divesting peripheral functions. Satellite companies sprung up to fill the need as large corporations moved to externalize employment (Kalleberg 2000). Parts suppliers were willing to provide required material and to assure delivery just-in-time. Almost any function that was not in one company's critical path could be performed by another outside company: copy and mail room services, maintenance services, packaging design, information technology, etc. By specializing in one thing, these service companies, often using contingent workers (i.e., employees that worked only when there was a requirement for their labor), could provide goods and services at lower cost and still make a profit (Barker and Christenson 1998; Polivka and Nardone 1989).

## **Workplace Restructuring**

### ***Organizational Tactics***

Restructuring in both the economy and the workplace has resulted in substantial change in the meaning of work. I have outlined the background on this latest era of change in work, but



it is likely that workers relate more to, and attach meaning based on, the tactical practices that firms have implemented as a result of restructuring. These tactics are illustrated in Figure 2.1 as the first phase of workplace restructuring.

In addition to flexible work systems, including JIT/TQC, tactical restructuring practices include employment externalization, reengineering, mergers and acquisitions, deskilling, and downsizing. I have addressed JIT/TQC and flexible work systems as tactics associated with adopting Japanese waste elimination and do not discuss them further here, particularly as they are less relevant to professional workers. These two tactics are covered extensively in the literature, perhaps disproportionately because they primarily affect the manufacturing sector, which now represents a minority of U.S. jobs (Applebaum et al. 2000; Barker 2000, 1993; Cornfield et al. 2001; Graham 1996; Grenier 1989; Harrison 1994; Schonberger 1982; Toffler and Toffler 2006; Vallas 1999, 2006). Each tactic that affects professionals, as listed under organizational tactics in Figure 2.1, is described in detail below.

### Employment Externalization

Smith (1997: 326) notes that “One of the most important employment trends in recent years has been the replacement of permanent [jobs] by temporary and part-time jobs in American firms and an increase in the numbers of people who are hired and let go on a contingent or externalized basis.” Employment externalization involves outsourcing, off-shoring, and other arrangements which diminish the employer-employee relationship. The most common categories of employment externalization have been outsourcing and off-shoring. Outsourcing is the practice of transferring work that had previously been performed within the vertically integrated U.S. firm to an outside company (Kalleberg and Marsden 2005). When the work is relocated outside of the U.S., to an offshore division or external firm, the practice is classified as off-

shoring. In both situations, the primary firm directly employs fewer workers and reduces its local workforce (Kalleberg 2000). Jobs may be created in another company or another country, but typically at a lower standard of employment.

Employment externalization also involves various approaches to reducing the ties between employee and employer. Whereas outsourcing severs the legal employee-employer relationship, other forms of employment externalization simply reduce the ties. All forms of employment externalization typically shift jobs to economic and labor market sectors that offer less job security, reduced or nonexistent health and pension benefits, and, often, lower pay than the job had when vertically integrated. These externalized jobs also involve less unionization and little protection from labor laws (Davis-Blake and Uzzi 1993; Kalleberg et al. 2000). The kinds of jobs that result from externalization have been classified in several ways. Kalleberg et al. (2000: 342) cite part-time work, temporary agency and contract company employment, short-term employment, contingent work, and independent contracting as the major kinds of non-standard work. The common denominator is that outsourcing, in most cases, creates alternative work arrangements that reduce the quality of the jobs involved. As a result, companies more frequently use employment externalization for their peripheral activities rather than their core functions (Kalleberg and Marsden 2005). However, Applebaum (1987) notes that professionals are increasingly among externalized employees as the practice extends beyond those involving unskilled or clerical workers.

Part-time work is simply regular wage employment, but with fewer hours worked than the standard 40-hour work week. Less than 35 hours a week is considered part-time. Although part-time work is the most common form of nonstandard work, comprising approximately 20 percent of the workforce (Kalleberg 2000), it is less prevalent among professional workers who

are more likely to be paid a salary or per a contract rather than hourly wages. However, there are situations in which professionals engage in part-time work either voluntarily or involuntarily. In general, studies indicate that part-time workers earn less than full-time workers, independent of differences in education, experience, and skill levels (Ferber and Waldfogel 1998; Tilly 1996).

Temporary agency and contract company employment shifts responsibility for workers, in part, from the client company (previously the full-time employer) to a temporary agency or contract company. The agency is the legal employer, managing staffing, scheduling, payroll, and taxes, while the client company handles supervision on the job. The management arrangement is a triangular employment arrangement where the administrative control lies with one company and the control of work performance lies with a second company. The implication is that the employee is in the middle and is diminished as a result (Kalleberg 2000; Rogers 2000).

Short-term employment refers to the fairly infrequent practice of hiring direct employees for short durations, generally agreed to by both employee and employer as a condition of employment. These employees have been referred to as “direct-hire temporaries.” Polivka (1996) suggests that the rise of temporary agencies and contract companies will limit the growth of this practice because they offer lower risk ways for companies to obtain labor for short periods of time.

The term contingent work originated with Freedman (1985) to refer to work arrangements that occur only on the condition that an employer needs short-term labor and, consequently, involve weaker ties between employer and employee than traditional work (Barker and Christensen 1998). However, the term now has broader connotations in that contingent work refers to “any job in which an individual does not have an explicit or implicit contract for long-term employment or one in which the minimum hours worked can vary in a nonsystematic

manner” (Polivka and Nardone 1989: 11). Considerable research has investigated the implications of contingent work for the worker (Barker and Christenson 1998; Tilly 1996) with the general conclusion that contingent employment involves a shift from good jobs to bad jobs (Kalleberg et al. 2000).

Independent contracting is of particular interest as non-standard work that does not always result in a lower quality of work and as an alternative work arrangement that is becoming more prevalent among professional workers (Smith 1997). Independent contractors are workers who are self-employed, typically working per a contract based on a specific job (as opposed to a specific wage), and are responsible for their own taxes and overhead. They are predominantly one-person businesses, often arising when a worker is downsized from a traditional job, where the contractor can apply skills gained during their traditional career to supplying services in the restructured economy. It is not unusual for independent contractors to provide services to the company from which they were downsized. Companies often prefer the contracting arrangement because they do not bear direct responsibility for the “employee,” do not have to provide benefits, and avoid tax obligations for unemployment compensation, workman’s compensation, and Social Security (Kalleberg 2000:356). Davis-Blake and Uzzi (1993) found that large corporations hire independent contractors more frequently than smaller companies, perhaps because contractors are viewed as more autonomous than temporary workers.

### Reengineering

Reengineering involves firms evaluating work functions with the intent of improving the efficiency of the labor process as a cost-cutting measure. There is a long tradition of companies focusing on labor process productivity and efficiency using scientific management, beginning with Taylorism in the late 1800s (Braverman 1974). These approaches were expanded beyond

the labor part of the process, to include all aspects of the process, particularly material (inventory) waste elimination with JIT/TQC in the early years of economic restructuring (Schonberger 1982). Current reengineering activities use statistical process improvement programs, such as Six Sigma and Lean dynamics (Harry and Schroeder 2006; Ruffa 2008).

The reengineering process originates as “a strategic effort to renew the organization’s alignment and/or competitive position through the simultaneous restructuring of work process(es) and organizational design” (Walston, Burns, and Kimberly 2000). Task-oriented jobs are deconstructed and rethought from the ground up to develop better ways of accomplishing tasks (Hammer and Champy 1993). Reengineering efforts frequently result in new procedures or the application of new technology requiring fewer workers. This practice often combines work activities with other jobs, also reducing the need for employees. Seventy percent of large U.S. corporations have initiated reengineering of some form (Champy 1995).

Job loss and employment externalization are common results of reengineering. Jobs may also remain with the company that has engaged in reengineering, but at a lower level of job quality. The job may be diminished by reclassifying it from full-time to part-time, moving work to a less desirable shift, or requiring higher performance with the same pay. When reengineering leads to a requirement for more output at the same pay, the employee often must work longer hours to get the job done, effectively reducing the pay-rate for the job.

The rigor with which companies approach reengineering varies considerably. True reengineering involves careful analysis of the steps required to complete a task or set of tasks. The intent is that improved methods and approaches can be identified that make performing the task(s) more productive or efficient (Hammer and Champy 1993). However, many companies assess jobs in a cursory manner and expect improvements based more on wishful thinking than

rigorous assessment. Fewer employees may be committed to tasks without proving that the work can be completed with fewer workers. These situations exacerbate the reduction in job quality associated with reengineering and contribute to the general trend of workers having to put in longer work hours in the era of restructuring.

### Mergers and Acquisitions and Consolidation

Mergers and acquisitions are both forms of corporate consolidation that result from corporate stock being acquired by another corporation. Budros (1997) notes that, “The most prolific wave of mergers and acquisitions in U.S. history has unfolded since 1980.” Companies merge with or acquire one another for many reasons, motivated by the potential for improved financial results. Often mergers and acquisitions are negotiated on friendly terms; however, they may also result from a hostile takeover or leveraged buy-out. Whatever the motivation, the predominant outcome are redundant employees, now working for one company after previously performing the same functions separately for two different firms. The result is a loss of jobs (Budros 1997).

Consolidation also occurs within corporations that are not involved in mergers or acquisitions. It may occur when reengineering indicates that job functions can be combined. Other times jobs are consolidated due to changing priorities. For example, Human Resources were decentralized during the 1970s when there was still an emphasis on internal labor markets for salaried employees. However, as internal labor markets declined, the priority in Human Resources changed from one of developing fair incentives for upwardly mobile employees to one of preventing lawsuits from downwardly mobile employees. This revised priority could be met without direct employee contact, leading to decisions to centralize Human Resources personnel in one location. Not only did this require less workers because of consolidation (e.g.,

less managers are required in the centralized model), but significantly fewer Human Resources employees were necessary to protect the company than to protect the company's workers.

### Deskilling

Deskilling modifies work functions in ways that allow the activities to be performed by interchangeable workers who require little or no training or replacing workers with technology. Deskilling differs from reengineering by focusing on reducing company's dependence on trained labor, whereas reengineering focuses on process efficiency independent of the skills required. Reengineering is much more proceduralized and generally confined to the labor process. Deskilling, on the other hand, often targets management functions generally thought of separately from the labor process. There is considerable overlap between the two as the objective in each case is cost reduction. The deskilled work may be done by workers with less training and knowledge or replaced with computers or automation. Often, a combination of lower-skilled workers and technology replace higher-skilled workers (Braverman 1974; Wardell 1999; Zuboff 1988).

For example, McDonalds uses special ovens and conveyor systems to allow the lowest skilled employee to consistently reproduce hamburgers that are cooked exactly the same. Machines control the pace and technique, which assures the same output and "quality" is achieved independent of the worker who attends the machines. Prior to deskilling the job of cooking hamburgers, an employee who knew how to cook was required. A cook required training and commanded a higher wage because of their skills. In today's McDonalds, very little skill is required and the food can be prepared with virtually anyone performing the job, typically a worker earning minimum-wage (Leidner 1993; Schlosser 2001).

Deskilling occurs at almost all levels of the company. Zuboff (1988) argues that

management hierarchies are the result of a deskilling process. The managerial talents of the entrepreneur were progressively stripped of more mundane tasks, like bookkeeping, and lower-skill employees were hired to perform the off-loaded tasks. Over time, as this process continued, bureaucratically managed firms emerged, requiring several layers of management employees. Moving down from the CEO, each layer required a somewhat more limited managerial skill-set, consequently commanding a lower salary. Today, many of the tasks required of the lower level managers are accomplished by information technology while other tasks have been assumed by direct labor in flexible work systems.

Deskilling at all levels has two consequences relevant to this discussion. First, jobs are stripped of the requirement for knowledge and skill, and then are shifted to lower-skill and lower-value jobs. Similar to employment externalization, deskilling typically diminishes the extrinsic and intrinsic rewards of a job, often turning a good job into a bad job. Second, once jobs are deskilled to the point that they can be replaced by technology, jobs are eliminated altogether. Workers are literally replaced by a machine.

### Downsizing

The most emotional reaction to restructuring is likely to be in response to the practice of downsizing. Downsizing is a catch-all term for eliminating employees from the payroll. Budros (1997: 230) defines downsizing as “an organization’s conscious use of permanent personnel reductions in order to improve its efficiency and/or effectiveness.” Typically, downsizing results from another restructuring practice, such as employment externalization or reengineering (Smith 1997).

Most of the literature on the reasons that companies downsize is either theoretical or descriptive. An exception is Budros’s (1997) study of predictors of downsizing where he



correlates company's financial characteristics with actual personnel reductions that the firm has undertaken. He shows that low shareholder value, consolidations, low productivity, high employee compensation levels, and deregulation within the companies industry correlate to downsizing. Budros' work offers some help in relating downsizing to restructuring tactics, but is limited in other ways. His analysis supports the notion of institutional investors as a catalyst for downsizing, the effect of deregulation on competition that results in downsizing, and the idea that high wages are "corrected" via downsizing initiatives. The correlation with consolidations indicates that mergers and acquisitions are a precursor to downsizing. However, a statistically significant relationship between downsizing and low productivity masks insight into the tactic used to address the low productivity and provide a rationale for a reduction in personnel. The downsizing company may be active in flexible work systems, reengineering, employment externalization, deskilling, or technology upgrades in an effort to address low productivity. The steps taken by companies to address low productivity prior to downsizing remain empirically understudied.

Downsizing may also occur with no underlying change in work activities as a rationale. Wall Street responds favorably to downsizing announcements and employee reductions may occur for economic reasons that have little to do with the labor process (Useem 1993).

Downsizing also occurs routinely in financially healthy companies in the restructuring era. Firms now exercise their perceived right to hire and fire at will as a proactive measure to keep their workforce, and costs, at bare minimum levels (Kalleberg 2003). Downsizing is sometimes used simply as a tactic to force productivity gains by retaining fewer workers to get the job done. As a result, employees who remain employed while others are downsized are often affected by increased workloads (Budros 1997).

Downsizing has had a dramatic effect on professional employees (Smith 1997). Studies generally indicate a profound negative impact on white-collar workers (Glassner 1994; Heckscher 1995; Newman 1988). However, as Smith (1997: 331) observes, “Even those who dispute the argument that middle management has been decimated acknowledge the sea-change in the norms and expectations for professional careers.” Among professionals, older workers appear to be disproportionately at risk (Bridges 2001; Sicker 2002). Because so many workers have first-hand experiences with downsizing, either personally or with coworkers, it is likely that downsizing represents the face of restructuring and holds significant meaning for today’s workers.

### ***Workplace Changes***

Economic restructuring consists of factors external to specific companies and more far-reaching than the workplace. However, the implications for the workplace, workplace restructuring, are also dramatic. Workplace restructuring affects the labor process or the social structure of work (Braverman 1974; Cornfield et al. 2001; Kalleberg and Berg 1987). These changes include weaker ties between employer and employee, corporate demands for increased worker and supplier flexibility, extensive labor cost reduction tactics such as downsizing, and the use of contingent, immigrant, and off-shore labor (Barker and Christensen 1998; Budros 1997; Harvey 1990; Kalleberg 2000, 2003; Osterman 1999; Sicker 2002; Smith 1998). Cornfield et al. (2001: xiii) conceptualize workplace restructuring as a “three-dimensional transformation of workplace social structure” consisting of devolution of decision making, casualization of the employment relationship, and a shift from collective bargaining to individual bargaining. Figure 2.1 delineates workplace changes as the second phase of workplace restructuring. I describe the first three changes, those outlined by Cornfield et al. (2001) below.

## Devolution of Decision-Making

Tactical decision-making has changed from a predominantly centralized management function, to a distributed function where decisions are made by work teams or employees who directly perform the work. Organizational hierarchies now have fewer layers (Leicht 1998). Fordist assembly lines have given way to flexible work systems. Just-in-time (JIT) supply chains simplify material management and transfer much of the responsibility for stocking material to suppliers. Total quality control (TQC) doctrine makes work teams and non-supervisory individuals accountable for quality levels (Capelli et al. 1997; Gittleman, Horrigan, and Joyce 1998; Osterman 1996; Smith 1997, 1998; Vallas 1999). It is debatable whether the labor process involves a less Taylorist mentality, but certainly the lines of control are less clear in the restructured workplace (Wardell 1999).

Kalleberg (2003) focuses on the notion of organizational flexibility as a key workplace restructuring strategy. He views the devolution of decision making as due, at least in part, to organizational objectives that position firms to respond quickly to changing market conditions. Kalleberg (2003: 154) cites two types of organizational flexibility: (1) functional or internal flexibility and (2) numerical or external flexibility. Internal flexibility involves the ability to redeploy workers within the organization while external flexibility involves the ability to vary the size of their workforce. The internal objective is met using flexible work systems (Appelbaum et al. 2000) and high performance work organizations (Gittleman et al. 1998) that emphasize participative work teams. Flexibility is, in part, accomplished by decision-making at lower levels of the organization and closer to where the actual work is being performed. The external objective is met using externalized employment where workers other than the company's regular, full-time employees assume a larger share of the workload. The demand for

externalized employees has given rise to nonstandard work arrangements that contrast to the traditional worker who has a long-term, career-oriented job that pays competitively and offers health and pension benefits. Nonstandard work arrangements include temporary workers, part-time workers, and contractors (Kalleberg 2003; Smith 1997).

Smith (1997: 316) also addresses the differential effect of internal and external flexibility. She concludes that steps taken by companies to gain internal flexibility have a direct impact on reshaping the work of blue-collar and non-managerial white-collar workers. Supervision and management are indirectly affected. By contrast, steps taken by firms to gain external flexibility, particularly the “decline of the permanent employment model,” have the greatest impact on professionals and managers.

#### Casualization of the Employment Relationship

The ties between employer and employee have weakened in the workplace compared to prior practices characterized by internal labor markets. Internal labor markets, which are often conceptualized differently in the literature (Althausen 1989), for purposes of this work, consist of all jobs within a firm (Doeringer and Piore 1971; Gordon et al. 1982; Osterman 1984). A company’s internal labor market includes jobs that are considered to be valuable, providing upward mobility and job security indicated by a company priority on retaining the occupants of these jobs in some capacity. Less valuable jobs are more commoditized. In the past, valuable workers holding internal labor market jobs with career ladders were likely to remain with one company for many years, perhaps an entire career. An unwritten system was in place that rewarded long-term employment with higher salaries later in a worker’s career. Similarly, benefits increased with tenure, culminating in a pension at retirement. Companies invested in these employees’ careers by providing training and career paths. Employees learned the

intricacies of a particular company and typically anticipated a long, loyal tenure with one company. Restructuring has ended or limited most of these practices (Capelli et al. 1997; Rubin 1996; Sicker 2002). The number of workers in internal labor markets with career ladders has significantly decreased. Further, many scholars have argued “that this ‘devolution’ [of internal labor markets] has caused the ‘externalizing’ of work careers and in the process has generated (1) a loss of job security and consequently higher rates of worker displacement; (2) a greater use of ‘contingent’ workers, who have low job security; and (3) higher levels of job mobility as a consequence of the presumably greater rates of job creation and job destruction” in the era of economic restructuring (DiPrete, Goux, and Maurin 2002: 176).

Bridges (2001: 323) proposes two models that help explain the decline of internal labor markets. First, “[internal labor markets] are shorn of their tops as those workers who are close to the apex of job ladders and promotion sequences are let go.” Second, “rates of progression are reduced throughout the hierarchy as work is out-sourced or moved down the corporate hierarchy.” He concludes that both models support the notion that older workers are disproportionately affected by changes in internal labor markets due to their experience and likelihood of having progressed to the upper levels of internal labor markets.

In today’s workplace employment is largely “at will,” contingent on a direct, short-term requirement for workers (Kalleberg 2000). Cornfield et al. (2001: xvii) use the term “just-in-time” workforce to describe the way that companies have eliminated any “excess” personnel from the labor process. The new corporate philosophy parallels just-in-time production, which involves the endless pursuit of eliminating wasted material from the production process. Other terms that capture the short-term, at-will nature of jobs in the restructured workplace include alternative work arrangements (Polivka 1996), contingent employment (Barker and Christensen

1998; Polovka and Nardone 1989), disposable work (Gordon 1996), externalized employment (Davis-Blake and Uzzi 1993; Kalleberg and Marsden 2005; Pfeffer and Baron 1988), and nonstandard employment (Broschak, Davis-Blake; Block 2008; Kalleberg 2000: 341; Kalleberg, Reskin, and Hudson 2000: 256). Firms now hire and fire based on short-term fluctuations in their labor requirements, eliminating any “wasted” labor costs. Most companies have now declined responsibility for job security and shifted the burden to the individual employee. Firms have also shifted much of the responsibility for labor planning by outsourcing to material suppliers and business service providers. With fewer permanent employees, corporations argue that they are able to run a lean and mean operation (Capelli et al. 1997; Harrison 1994; Osterman 1996; Rifkin 1995; Rubin 1996).

Another area of shifting responsibility, helping companies to cut costs, is benefits. The cost of healthcare, when it is still provided, is now increasingly borne by the employee. With increases in the number of contingent workers, fewer employees now receive benefits of any kind. Where previously a pension awaited the long-term loyal employee, workers are now asked to take responsibility for funding their own retirement through contributions to 401k plans and IRAs. These areas of weakened employer-employee ties involving a reduced commitment to permanent and steady employment and less responsibility for benefits constitute a casualization of the employment relationship inside the bureaucratic workplace (Capelli et al. 1997; Cornfield et al. 2001: xvii).

#### Shift from Collective to Individual Bargaining

Collective bargaining, primarily through labor unions has steadily declined during the era of restructuring. Many companies set specific objectives to limit or eliminate labor union influence on their businesses. A common approach has been to relocate production to “right-to-

work” states, largely in the Southeast, or to countries where no organized labor exists (Lichtenstein 2002). It is questionable whether unions would hold any significant power today because they were in decline prior to restructuring; however, restructuring has certainly hastened their demise.

Individual bargaining generally refers to the idea that individual employees must manage their own career. This notion goes beyond the fact that employees individually “negotiate” for their salaries and benefits. This quasi-negotiation does take place in the professional ranks, particularly within the upper levels where employees and companies work under employment contracts that are agreed to beyond the company and a single employee. At lower levels, each employee works at an individually determined salary based, to varying degrees, on employee performance and value to the company. Where companies previously studied the labor market to determine equitable salaries, today they pay based more on individual situations and, often, based on the cost associated with the job being outsourced.

The real change, however, is that the burden for managing one’s career has shifted from the company to the individual. Corporate ladders in internal labor markets, providing a career path, have been replaced by contacts from industry-wide networking that are leveraged for career advancement. Building networks outside of the company are essential because downsizing can change a worker from employee to job-hunter with little warning. Internal networks within the company are less valuable because companies are less committed to promoting from within and have less need for skills that are unique to the company. In short, the employee is much more on their own to take care of their career and job opportunities, and remuneration.

## **Other Restructuring Considerations**

The background literature on restructuring, as outlined in Figure 2.1 provides several aspects that I expected to inform the meanings that workers associate with economic and workplace restructuring. This overview proved helpful in organizing worker's narratives during my analysis of their thoughts on restructuring. However, because meanings are based on perceptions, there are three other areas of the literature that provide insight into more subjective or emotional aspects of restructuring. These are reviewed as follows: (1) the use of "proactive" tactics by financially healthy businesses; (2) shifting perceptions of jobs from those that are "good" to those that are "bad;" and (3) issues associated with attitudes toward nonstandard work arrangements.

### ***"Proactive" Tactics***

Firms respond both reactively and proactively (Bluestone and Harrison 1982; Downs 1995; Koeber 2002) to economic restructuring. For example, an early reactive strategy was to copy Japanese production approaches such as JIT/TQC and Flexible Work Systems (Schonberger 1982; Smith 1997). Copying Japanese techniques began as a reactive strategy for meeting the challenges of global competition. The line between changes necessary to compete and changes to improve profitability, however, quickly blurred. An earmark of today's restructuring is that healthy companies proactively implement changes, often laying off employees at times when they are achieving excellent financial results. Strategies that began as necessary for survival are now routinely part of a new, restructured, way of running a company. Reagan administration programs encouraged unbridled capitalism and U.S. companies responded by embracing this ideology and taking it to new levels. Kalleberg (2003: 171) contrasts strategies that companies implement to become more flexible, observing that, "Some [firms] have taken



the ‘high road’ and adopted high performance work organizations and functional flexibility, whereas others have taken a ‘low road’ and sought to cut costs by treating workers as disposable.” There is not much traffic on the high road, which likely affects the opinions of workers, particularly older workers who have experienced more reciprocal relationships with employers.

### ***“Good” Jobs and “Bad” Jobs***

Two primary theories of labor market segmentation undergird the fundamentally negative consequences of workplace restructuring practices by differentiating between the characteristics of jobs that are highly preferred and jobs that are less preferred. First, Averitt (1968: 7) conceives of two distinct business systems, a dual economy, that exists in the United States. One business system is comprised of firms in the core or “center” economy and the other business system of firms on the “periphery.” The economic core is “composed of monopolistic industries that are large in size and influence, diversified, capital and technology-intensive, and operating in national and international markets” (Reid and Rubin 2003: 407). Employees in the core generally work full-time, are most likely to receive benefits, and enjoy a relationship with their employer most nearly reflective of the traditional implied employment contract. On the other hand, the economic periphery is “composed of small firms characterized by restricted markets, high risk, a small number of employees, and labor-intensive production techniques” (Averitt 1968; Kalleberg, Wallace, and Althuaser 1981; Reid and Rubin 2003: 407).

Second, alternatively, other theorists posit dual labor markets, one primary and one secondary. The primary labor market involves work that is characterized by better pay, employment stability, bureaucratic management, career ladders, and, often, unionization. Jobs in this arena require human capital such as education, special training, or unique skills. In contrast,

the secondary labor market involves jobs that require little or no human capital and offer limited remuneration, advancement opportunities, or job security (Doeringer and Piore 1971; Gordon 1972; Osterman 1975; Gordon et al. 1982). In simplistic terms, both theories define where the good jobs and the bad jobs are located, an idea that helps to understand the effect of restructuring practices and the intense meaning that they often evoke in workers. Combining dual economy theory and dual labor market theory with internal labor markets (Althauser 1989), the effects of restructuring can be conceptualized as a shift from good jobs staffed with valued personnel to bad jobs held by commoditized workers (Cappelli 2003; Kalleberg, Reskin, and Hudson 2000; Tilly 1996).

As jobs are shifted from better to worse economic sectors—whether due to employment externalization, reengineering, or deskilling—job characteristics are altered. Jobs that were previously full-time become part-time. Jobs with benefits disappear. Jobs operating under an implied employment contract and a sense of permanence become temporary. Kalleberg et al. (2000) summarize the new, nonstandard jobs as jobs that “pay poorly, lack health insurance and pension benefits, are of uncertain duration, and lack the protections that unions and labor laws afford.” Employment becomes contingent on the short-term requirement for labor. A temporary help agency, Manpower, Inc., with over 4 million employees, is the largest U.S. employer (Hoovers 2005), more than doubling second-place Wal-Mart’s 1.8 million employees. Contingent employment now affects nearly all occupations, regardless of status. Barker and Christensen (1998: 2) note, “the emergence of a highly skilled, technical or white-collar secondary workforce [is a new development for] this relatively privileged set of workers.” The practice of using contingent employees is often equated with the idea of disposable workers. That is, workers who are eliminated as soon as a specific set of tasks are completed. When

additional tasks arise, workers are newly-hired, rehired, or recalled to perform jobs that are contingent on the availability of short-term work.

Researchers have investigated the effects of the shift from good to bad jobs, focusing primarily on contingent (Barker and Christensen 1998; Kalleberg 2000; Rogers 2000; Smith 2001) and downsized workers (Kaufman 1982; Knudsen 2003; Koeber 2002; Quadagno 2001), who often experience downward mobility in reemployment (Rubin and Smith 2001). Bad jobs have increased dramatically during the past 20 years in the United States. Since 1972, temporary jobs have grown by 11 percent per year (Kalleberg et al. 2000). Part-time employment, primarily involuntary, has increased by 10 percent from 1970 to 1990 (Tilly 1996). Broschak, Davis-Blake, and Block (2008) estimate that non-standard employment may comprise as much as 33 percent of the U.S. workforce. Worker opinions about the quality of jobs, and work in general, are likely influenced by this trend toward an increasing number of bad jobs.

### ***Attitudes and Behavior in Nonstandard Work Arrangements***

Nonstandard jobs have clearly been shown to be less desirable than standard work arrangements (Kalleberg et al. 2000). Organizational behavior theory suggests that employees in nonstandard work arrangements “have fewer expectations of their employers’ obligations regarding pay, benefits, access to training, and opportunities for advancement” (Broschak et al. 2008). Expectations, then, are that nonstandard workers will have less commitment, poorer relations in the workplace, and worse behavior both within their work role and external to their work role than employees in traditional work arrangements (Kalleberg and Reynolds 2003; Rothchford and Roberts 1982; Van dyne and Ang 1998). The expectation of largely negative implications due to change in work, along with increasing empirical support (Amundson and Borgen 1982; Chan and Stevens 1999; Herzenberg, Alic, and Wial 1998), is one main reason

why the study of how identity processes mediate altered work situations is an important research topic.

Broschak et al. (2008: 5) argue that all nonstandard jobs are not substandard; suggesting that the specific type of work arrangement is likely to influence worker outcomes. Noting that “Work arrangements are likely to exert a strong influence over individuals’ work attitudes and behaviors,” they admit that research to date has been unsuccessful in capturing attitudinal and behavioral differences between workers in different work arrangements. Broschak et al. (2008) suggest that a significant research weakness has been a tendency to treat nonstandard work as one homogenous category when, in reality, differences exist within and across different work arrangements. When nonstandard work arrangements have been differentiated, researchers have not emphasized the relative quality, good versus bad, of the nonstandard work. They also note that there has been a stronger focus on attitudes than on behaviors, implying that attitudes do not necessarily translate into behavior. Smith (1998) views the research deficiency as a lack of data on workers *in situ*. Although Broschak et al.’s conclusions are drawn with low-wage workers in mind, and Smith focuses on temporary workers, I suspect that differences also exist between nonstandard work arrangements that depend on the occupational status of the workers involved. That is, professionals are likely to experience alternative work arrangements differently than technicians or low-skill service workers.

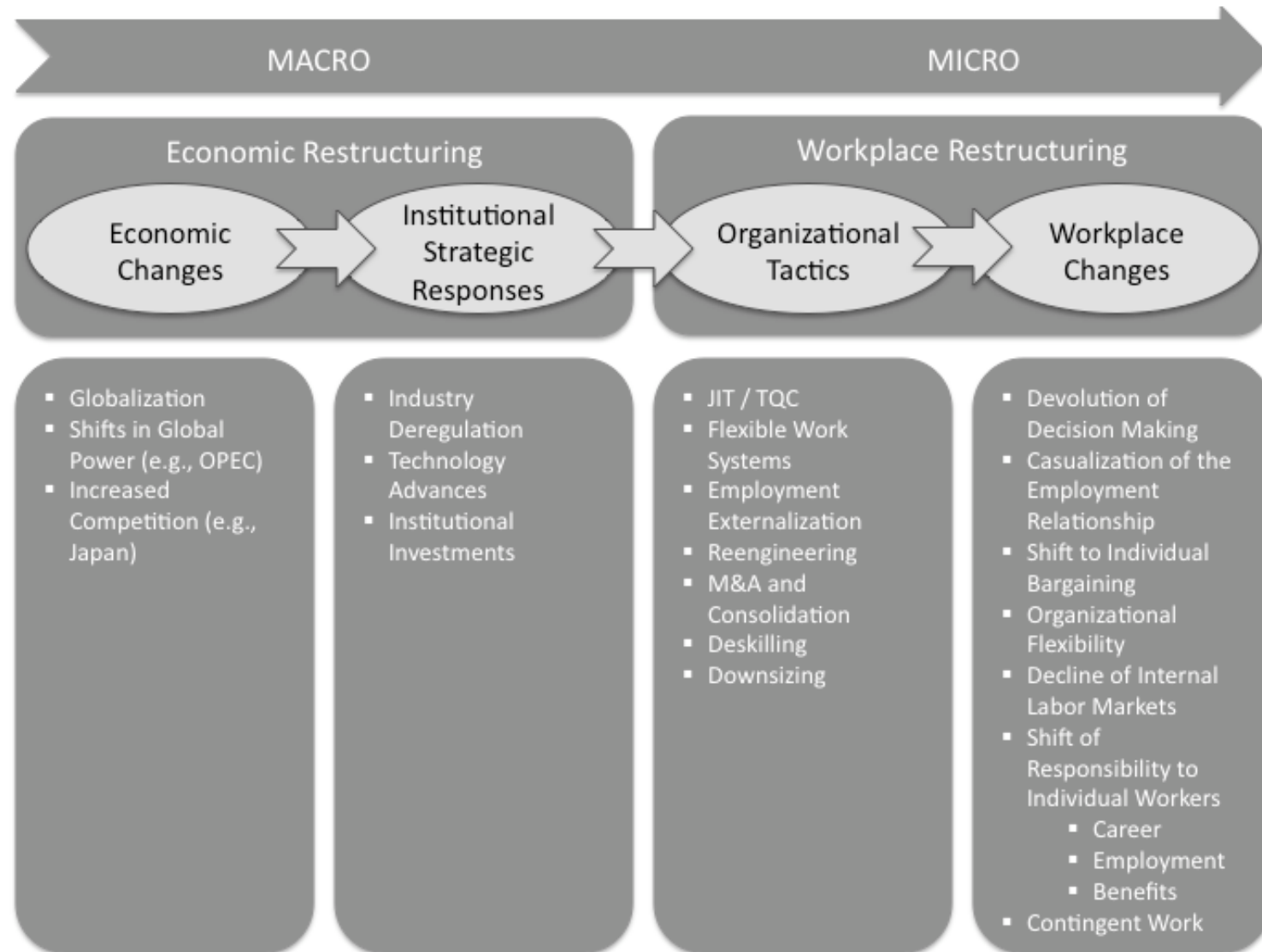
This chapter serves as a foundation for exploring perceptions associated with restructuring. The meanings that workers’ attach to restructuring culminate, to varying degrees, from thoughts associated with any of the areas that I have explored in this literature review. Of course, new sources of meaning also emerge in the course of my research. In any case, this chapter informs my analysis of how perceptions of restructuring affect the work experience. This

chapter also provides a view of restructuring that delineates the topic at multiple levels, levels that correspond to the levels at which structure originates. Societal, institutional, organizational, and individual perspectives have been provided. These levels of structure are key to Stryker's (1980) conception that higher-order structure informs lower-order structure, ultimately being reflected in constraining individual identities. These ideas are brought together in identity theory, which I explore at length in the next chapter.

### **Summary**

This chapter outlines the current scholarship regarding economic restructuring. As such, it provides a framework for interpreting the meanings of workers who have been in the workforce during the era of economic restructuring. Economic changes, institutional strategies, organizational tactics, and workplace changes are all potentially detrimental to the interests of individual workers. Each of these phenomena represent structure that workers are expected to view as marginalizing. Globalization and downsizing, in particular, should be criticized and may be a source of resentment on the part of workers.

Overall, economic restructuring, which has resulted less constrained forms of capitalism, is expected to hold significant negative meaning for older workers. Their perspective following careers embedded in the restructured economy has been heavily influenced by this structure. I examined the structure that impacts boomer professionals, and how it that structure is viewed by these workers, within this framework. Further, I suggest that the delineation of economic restructuring that I have presented provided a baseline to assess the implications of the restructured economy as perceived by boomer professionals. That is, viewpoints that deviated significantly from these expectations required further investigation.



**Figure 2.1. Economic and Workplace Restructuring**

## **CHAPTER 3 - IDENTITY THEORY**

### **Symbolic Interactionism and Boomer Professionals**

Traditional symbolic interactionism provides micro-level theory that asserts that individuals behave based on their definition of the situation. Meanings are central to situational symbolic interactionism, as envisioned by Blumer(1969), in that people interpret each other's actions and base their actions on the meanings that they attach to each aspect (i.e., objects, themselves, and others) of a given situation. Situations, or interactions involving an exchange of symbols (e.g., language, body language), are the source of meanings. That is, meanings are developed through interaction. Meanings result from an interpretive process in which perceptions that define the interaction determine how the interaction is managed by the individual.

Boomer professionals in today's workplace face many new situations, or interactions, that they must interpret and manage. Work arrangements, such as contingent labor, in the restructured workplace consist of a collective set of interactions, forming a situation that must be navigated by today's worker based on interpreted meanings. Meanings that they associate with the restructured workplace, their identity within the workplace, and how they behave in their particular work situation are keys to understanding how older workers are responding to economic and workplace restructuring. Examining restructuring within the symbolic interactionist paradigm provides this focus on meanings, providing a useful perspective for investigating my research questions.

In addition to a focus on meanings, the situational approach of symbolic-interactionism, provides an emphasis on individual agency and connecting social organization with individual behavior (Reitzes and Mutran 2002; Stets 2006). However, situational symbolic interactionism is limited in its conception of structure, an important aspect of my research. As Stets (2006: 88)

notes, “From [the situational] perspective, individuals are free to define the situation in any way they wish with the consequence that society is always thought to be in a state of flux with no real organization or structure.” Because restructuring generates structure at multiple levels, the effects of higher order types of structure must be included. The macro-level forces associated with economic restructuring, in particular, transcend social interactions and need to be understood as the product of the broader global and U.S. economy as well as economic, political, and business institutions and organizations. The macro-level forces affecting individual workers, that I want to account for, seem to originate beyond the scope of situational symbolic interactions.

### ***Structural Symbolic Interactionism***

Stryker (1980: 53-55) addressed these limitations of situational symbolic interactionism when he combined aspects of role theory and symbolic interactionism to theorize a structural version of symbolic interactionism. The key points of his framework are as follows:

1. Through symbolic interactions, we learn how to classify the physical and social world and how we are expected to act toward the things to which we attach meaning.
2. One of the things we learn to classify is socially legitimated positions that a person can hold (e.g., worker, spouse, thief, nurse, old man). The shared behavioral expectations associated with positions constitute roles.
3. We categorize or name people who act according to these legitimated positions based on the roles they occupy. In the process of naming people as role occupants we invoke social structural expectations for their behavior.
4. We also reflexively identify our own role positions and, by doing so, internalize expectations for our own behavior.



5. When entering social interactions, we attach meaning to the situation, the people in the situation and the characteristics of the situation and organize our behavior based on our expectations.
6. The act of defining situations causes us to invoke a role-taking process, internalizing social expectations for our behavior in the situation. Role-taking involves adopting the expectations for the role positions that are relevant to the situation.
7. Role-taking depends on the larger social structures in which the interaction is embedded. It is through roles and role-taking that social structure effects the boundaries imposed on the situation.
8. As role-taking enables structural boundaries on the situation, it is part of a reciprocal relationship in which unconstrained behavior in the situation can affect social structure. This part of the process, role-making, accounts for individual agency in cases where we personalize roles that we have internalized.

### **Identity Formation**

In Figure 3.1, I present my interpretation of identity formation and evolution as conceived by Stryker (1980). Beginning on the left-hand side, structure is depicted as a multi-level phenomenon. Roles are shown as a product of social structure that interact with situations. Identity is formed through a combination of role and situational processes. These processes are fluid with structure in a constant state of flux, influencing changing roles and new situations to create a dynamic set of identities.

Figure 3.1 illustrates the primary process, but note that identities are generally associated with specific roles and that self is the culmination of all of an individual's role identities. Further, the process is not completely uni-directional; it also operates in reverse to some extent. Identity

affects roles and situations and structure is modified by changing role/situations. Nonetheless, this depiction is useful for conceptualizing how an identity as a worker is formed within the constraints of structure associated with restructuring. Work roles and workplace situations must both be explored to understand identity meanings as a mediator of behavioral meanings and to relate restructuring to behavior in workplace arrangements.

For example, to understand how workers see themselves in a traditional work arrangement requires an understanding of how they perceive their role as workers as well as how they interpret specific work situations. A man might place a high importance on his role as a breadwinner, which would be understood in terms of his worker role. In a specific situation, he might not accept an opportunity to earn extra income because he perceives the situation as ethically risky. His behavior does not conform to his work role in every situation; an important distinction in analyzing worker behavior.

### ***Hierarchical Structure***

Stryker's (1980) framework explains the influence of social structure on interactions while also allowing for individual agency to enter the equation. The left hand side of Figure 3.1 shows the levels at which social structure emerges, depicted on four levels, from the macro- to the micro-level, as conceived in Stryker's framework. First, at the most abstract, macro-level, are structural elements of society such as class, race and ethnicity, and age. These aspects of society constrain the types of social interactions that we are likely to engage in. For example, an older worker with a bachelor's degree from a state university is likely to interact with different people than a recent graduate with a Harvard MBA. Second, on a slightly smaller scale, structure emerges from our institutions, such as government, the economy, and religion. Third, organizations within these institutions, such as the IRS, XYZ Corporation, or the community

church are formed within the structural constraints of the broader institutions. The organizations that are likely settings for our interactions are products of structure that constrain the meanings that we attach to situations. Fourth, at the micro-level are smaller groups and individuals with whom we engage in symbolic interactions.

To a large extent, the micro-level is embedded in broader forms of structure. However, we also generate structure in our symbolic interactions. As we develop shared meanings as the result of social interaction, those shared meanings refine our expectations for individuals, objects, ourselves, and future situations. Individuals generate the very structure in which they are situated and constrained by. Stets (2006: 88) summarizes that “At the same time that individuals are creating social structure; they also are receiving feedback from the structures they and others build to change themselves and the way they operate. Thus persons are always embedded in the very social structure that is, simultaneously, being created by those persons.”

The effect of structure on the individual occurs in the way that we define the situations that we enter as well as by constraining the types and qualities of the interactions that we take part in. Our interactions may vary in their situational context from one situation to another. However, our definition of the situation also reflects more generalized expectations that are the product of higher order structure. Stryker conceptualizes these higher level expectations as roles, the expectations that society forms based on a person’s social position. For example, a medical doctor behaves in symbolic interactions according to both his role as a doctor and his definition of the particular situation that he enters. Others’ expectations of the doctor are both situational and positional based on his role. Stryker (1980: 53) works to provide a theoretical framework that “bridge[s] social structure and person, [being] able to move from the level of the person to that of large scale social structure and back again.”

The left-hand side of Figure 3.1 illustrates the levels at which structure emerges in relation to the individual worker. Constraints that are directly applicable to my research develop at the highest level in that economic conditions affect the workplace and consequently the worker. This corresponds to the process of economic and workplace restructuring, where abstract economic changes have a cascading effect on industry responses to the change, pan-industrial strategies emerge causing organizational tactics to be adopted that result in general patterns of workplace change. Social structure develops along those same lines. Economic structure constrains organizations. Organizational responses add additional structural constraints, which in turn affect and initiate new department and work group structure. For example, an increase in oil prices by OPEC raises operating expenses in various industries, placing constraints on quarterly financial performance. Strategies emerge to reduce other expenses to “soften the blow,” placing pressure on individual companies to cut expenses. Tactics emerge such as limiting travel and holding more conference calls. The individual worker now must work within the constraints of an economy with higher oil prices, an increased sensitivity to all types of operating expenses, pressure to cut specific travel expenses, and an altered labor process that involves less face-to-face contact with clients and more conference calls. Structural constraints emerge at various levels and tend to accumulate more limitations as constraints cascade from the macro- to the micro-level.

Further, the structural constraints that emerge at the higher levels, the societal/cultural levels, which include economies, industries, companies, and work organizations, impose limits primarily on individuals’ behavior within their position as a worker. At the situational level, the structure inherent in a person’s role as a worker is present and influential, but other considerations, such as other roles held by the worker, including the definition of the situation

also have an effect. Continuing the example of an oil price increase, one worker who is also a mother might choose to conduct conference calls from home if she perceives others in her work group will find that to be acceptable behavior. Another mother might forego this convenience because she thinks that her supervisor will not approve. Situational structure, then, differs from higher-order structure. Stryker (1980) applied the concept of roles to conceptualize the effect of higher-order structure constraining one's position, or role, in society, thus differentiating structural symbolic interactionism from traditional situational symbol interactionism. Figure 3.1 captures this difference by showing the effect of higher-order structure on roles and that of micro-level interactions on situations.

LaRossa and Reitzes (1993: 147) define roles as “shared norms applied to the occupants of social positions.” In the broadest sense, roles are socially defined as the shared meanings associated with a given position in society (Stryker 1980: 54; Stryker and Burke 2000; Turner 1962). For example, the role of worker has expectations of arriving at work according to a prescribed schedule. This expectation reflects the structure necessary for a modern industrial economy to operate (i.e., a shared system of standardized time). It also reflects the structure imposed by the worker's company, that is the requirement to have workers on the job at scheduled times, and groups of workers at the same times, based on the work to be accomplished. These are generalized positional expectations of someone in the role of worker that reflect structure that emerges at multiple levels. LaRossa and Reitzes (1993: 147) label roles of this type, those that “refer to social organizations, groups, or institutions” as formal roles.

In addition, there are situational expectations, and associated situational structure, that have developed through interactions in which shared meanings emerged for being on time for work. An interaction with a coworker might have alluded to a dependence on one another to

work on a project at the start of work tomorrow or a discussion with the boss may have conveyed the importance of timeliness. This is an example of an informal role in LaRossa's and Reitzes (1993: 147) classification, referring to "an interactional or interpersonal position." Both the worker role and the situational role, the formal and informal roles, must be considered to understand the relevant expectations that constrain a worker's behavior.

### ***Role-Taking and Role-Making***

Roles originate as a product of social structure as advanced by Stryker's (1980) structural symbolic interactionism. He builds on Turner's (1962) notion of role acquisition, specifically Turner's idea of "role-taking" to conceptualize how individuals internalize social structure. Roles are acquired by role-taking, where individuals learn and apply the expectations of the positions that they assume. LaRossa and Reitzes (1993: 148) assert that "Role taking enables a person to identify the regularities that unite occupants of a role and to align role behaviors with the role meanings held by others." Role-taking is largely an external process of internalizing roles and role expectations.

Turner (1962) also suggests that there is a second part of the role acquisition process, role-making. Similarly, Burke and Reitzes (1981: 315) point out that learning roles involves an additional process beyond the "identification of" roles, individuals also engage in a process of "identification with" roles. In addition to being external and objective, roles are internal and subjective in that they are invested with individual meanings, values, and motives. In role-making individuals actively negotiate the roles that they occupy (Reitzes and Mutran 2002) by adapting the role to their individual situations. They personalize the roles that they take, "actively shap[ing] and infus[ing] roles with intrinsic, subjective, and self meanings" (Reitzes and Mutran 1994: 315; Turner 1956). Role-making, although constrained, provides a way of explaining

human agency as a secondary force in defining roles. While largely structural, roles may also involve a degree of agency. Aging and restructuring can be conceived as largely defining the structural roles that individuals internalize, yet, to a varying degree, individuals modify their roles to bring their situations in line with their goals and internal values (Burke 2004; Tsushima and Burke 1999). Figure 3.1 depicts roles as consisting of both role-taking and role-making. Role-taking is shown schematically at a higher level to connote the broader influence of society while role-making is lower-order in the sense that more individuality is involved.

If an individual enters the workforce, she takes on the role of worker, based primarily on expectations of the position, through a process of role-taking. She may personalize her work role via role-making, but still is likely to rely on social expectations as guidelines for acceptable forms of individualization. She behaves in her role according to the processes of role-taking and role-making. These processes are primarily structural in the sense that behavior is patterned and highly constrained. However, role-making can also include individual agency. For example, someone once chose to wear jeans to work instead of a suit, before it was acceptable behavior, exhibiting agency. This practice caught on, casual Friday's became commonplace, and contemporary work culture was altered. Today, personalizing a work role with casual attire is more often a process of role-taking than role-making. Nonetheless, agency is possible and it emerges, conceptually, from the micro-level notion of identity (Mead 1934; Reitzes and Mutran 2002; Stryker 1980; Turner 1962; Tsushima and Burke 1999).

### ***Role Identities (Self)***

Through identity processes, individual workers have some say in how restructuring shapes the work role and some say in how aging affects their behavior. For example, a consequence of extensive downsizing is that the remaining employees, those not downsized,

need to work longer hours in order for the business to continue to function. Individual motivations for working more include a desire for their company to be sufficiently successful to continue to keep them employed. Fear of further downsizing also plays a part. Employers and employees devise ways to make the longer hours more palatable, such as by offering flexible work hours or allowing work to be done from home. Today's restructured workplace involves longer hours, flex-time, and telecommuting that have been negotiated, albeit primarily through structural forces, but also influenced by individual agency. Similarly with aging, chronological age and age identity are quite different (Logan et al. 1992). Some 50 year old people think and behave like much younger persons while others feel much older. Structural forces constrain age appropriate behavior, but individual agency allows people to deviate from social expectations and ultimately to alter those expectations. A classic sociological interplay of structure and agency may be taking place in today's workplace, altering age identity and the labor process as workers struggle to adapt structurally defined work and age roles to their individual standards (Tsushima and Burke 1999).

Roles are fluid and dynamic, evolving over time and throughout the life course (Reitzes and Mutran 2002). They are constrained by structure, but are "porous and flexible boundaries," changing with formal and informal structure and individual agency as well as being influenced by other roles (LaRossa and Reitzes 1993: 147; Rosenberg 1979). Roles provide a construct to envision how structure, at various levels of abstraction, determines the way that individuals perceive the expectations of social positions that they assume. Such a construct is key to understanding the relationship between society and individual behavior. Roles, however, do not directly determine or constrain individual behavior. Behavior, from a sociological social psychological perspective, is a social product and the effect of society is conceptualized with



roles. Situations are contextualized with roles (LaRossa and Reitzes 1993). Societies influence on individual behavior, operating through roles and situational interactions, however, is mediated by the individual's sense of self, their identity. Stryker (1980: 289) clarifies this distinction between role and identity, asserting that the term role identity "implies a duality. Role is external; it is linked to social positions within the social structure. Identity is internal, consisting of internalized meanings and expectations associated with a role." Identity forms, and evolves, in large part, as the result of the multiple roles that an individual adopts and the social interactions in which they participate. Figure 3.1 shows one's identity forming and evolving as the result of their individual set of roles and the social interaction in which they participate.

Identity as a construct and theory regarding how identity develops is extremely useful for understanding the relationship between society and individual behavior. Understanding how roles are dynamically constructed and shape individuals' identities provides a conceptual basis for examining identity as self-meanings and for differentiating the role of structure and agency in identity formation. For example, a worker that discusses their work arrangement in terms of others' expectations likely perceives self-meanings as the result of structure, whereas a worker who discusses their role from a more individualistic standpoint may indicate an agentic component to their identity.

Summarizing the formation of identity, then, Figure 3.1 depicts Stryker's (1980) conception of how identity develops, as a product of external structural forces. The diagram shows the cumulative effect of structure that is emergent at three levels, macro, meso, and micro, with each level strongly influencing the structural constraints that individuals are bound by in their situational interactions. The structural constraints are conceptualized as defining both roles and situations, with roles being more a product of broader society and situations defined

primarily by the participants. Roles inform situations and situations inform roles. Identity is formed, or evolves, primarily as the result of social structure, as individuals internalize roles (role-taking) and reflexively apprise the expectations of others defining situations. Agency enters the equation via role-making and via situations in which the person endeavors to attain individual goals in interaction.

LaRossa and Reitzes (1993) also address the linkage between the individual and society with an emphasis on structure. However, they focus on contexts to conceptualize role and identity formation from a symbolic interactionist perspective. Contexts include three constructs that explain society's effect on the individual, derived from the "negotiated order approach" to social organization (Strauss 1978: 98-99). These constructs are as follows (LaRossa and Reitzes 1993: 152):

1. *Negotiation* refers to the many ways of "getting things accomplished" and includes activities such as bargaining, compromising, and engaging in collusion.
2. *Negotiation context* refers to the structural properties that enter most immediately into the course of negotiations
3. *Structural context* impacts directly on the negotiation context and is the larger, generally societal-level, context "within which" negotiations take place.

This conception has much in common with Stryker's (1980) structural symbolic interactionism. Structural context aligns with the broader forms of social structure that I have categorized as societal/cultural. In both conceptions societal structure contextualizes interactions, roles, and identities. Negotiation context aligns with structure that I have depicted as affecting the situation. Negotiation is situational, which I have shown as the interactions that one has with others. LaRossa and Reitzes (1993: 153) note that "the dialectical link between the individual and

society is that the relationship between negotiation and negotiation context and between negotiation context and structural context is reciprocal.” Roles and identity are less prominent in the negotiated order approach, but emphasize the interrelationships between contexts, interactions, roles, and identities. A key insight of the negotiated order approach is the notion that society affects the individual, but the individual affects society in a bi-directional process.

LaRossa and Reitzes (1993) also apply Strauss’s (1978) concept of mesostructure, in combination with the negotiated order approach, to depict the conceptual space between structure and process. They assert that mesostructure is analogous to a stream flowing down a mountain. The physical structure of the mountain constrains the path of the stream, but the stream also alters the mountain’s structure over time. A boomer professional might occupy a mesostructure-like social realm where they are constrained by the structure of aging and economic restructuring, but they are also part of a process that influences the structure. If we imagine that the mountain is being continually altered by volcanic activity, the analogy becomes even stronger. Age identities and economic restructuring are constantly being shaped and reshaped by forces beyond the individual worker. This concept, in combination with the above discussion on identity formation, provides a foundation for investigating structure and agency in terms of their origins as well as their dialectal nature.

For example, a worker who pursues a career change late in life is a study in structure and agency. The reasons that the worker gives up their original career are largely structural. Perhaps, they became disillusioned because that did not receive the training necessary to obtain challenging new assignments. Perhaps their upward mobility was constrained by a corporate youth culture. Or perhaps they became too expensive as their salary increased with tenure and they were downsized. Whatever put them on the path to developing a new career, they likely

faced considerable pressure from friends and family that conformed to a societal view that one becomes too old for a new career. Structural forces create the situation and then work to limit the worker's response. Nonetheless, some people do exhibit agency and start new careers late in life. As more and more older workers successfully navigate such transitions, the less they breach social expectations. Acts of agency redefine acceptable age norms and what began as almost deviant behavior becomes more normative. Universities have become more accepting of non-traditional students and the path has eased for older workers to reinvent themselves. It's possible that this is an important enough phenomenon that public policy should support such career changes. This example shows the reciprocal nature of structure and agency and the importance of understanding what structural constraints actively constrain today's worker and where older workers are resisting these forces.

Identity theory is broadly descended from Mead's (1934) view that society shapes the person (the self), which shapes social behavior (Stryker 1980; Stryker and Burke 2000). In the Meadian tradition, the self is "the set of shared social meanings that designate and define a person" (Reitzes and Mutran 2002: 648). The self, one's set of identities, is conceptualized based on multiple roles, such as father, husband, worker, ex-social activist, which a person adopts as positions in life. Individuals may construct multiple identities within a single role. For example, someone assuming the role of spouse might have identities as a companion, a sexual partner, and a provider (LaRossa and Reitzes 1993). Identity is also based on roles that result from ascribed statuses, such as age, race, and gender (Logan et al. 1992). An individual, then, holds many roles at any point in time, with role identities associated with each role. A role identity is "the categorization of the self as an occupant of a role, and the incorporation, into the self, of the

meanings and expectations associated with that role and its performance” Stets and Burke (2000: 225). Self is an individual’s integrated set of role identities.

### **Role Self-Investments**

In addition to linking individuals with social structure, role identities provide frameworks for individuals to develop a sense of purpose, personal meanings, and agency. Several areas of research have developed that examine the way that roles are infused with self-meaning and self-motivation (i.e., identity meanings). Figure 3.2 presents an overview of self-investments that have developed in each of these two research areas.

### ***Commitment***

Commitment is conceived as the degree that a person is tied to a role and others related to that role. It is viewed as a measure of the strength of the ties, sense of belonging, and social attachment that a role enables (Burke and Reitzes 1981; Reitzes and Mutran 1994: 315). Stryker (1980) defines commitment in terms of “the social and personal costs entailed in no longer fulfilling a role based on a given identity” (Stryker and Serpe 1994: 19). The value of a role is a function of the strength of ties within an individual’s social network that are made possible by their having that particular role identity. Social ties, and consequently role commitment, can be either interactional, through social networks, or affective, providing a sense of belonging (Reitzes and Mutran 2002). Commitment is generally viewed as a proxy for social structure and as a determinant of role identity. Figure 3.2 shows commitment associated with several roles (note subscripts) influencing identity.

### ***Identity Hierarchies***

Figure 3.2 also depicts two measures of role importance: an identity salience hierarchy and a psychological centrality hierarchy. Rosenberg (1979) conceives importance as based on

psychological centrality, a measure of how central a role identity is to an individual's sense of worth. Stryker and Serpe (1994: 17) alternatively, focus on salience, the probability of a role identity "being invoked in a given situation." Psychological centrality contrasts with salience in that centrality is a conscious appraisal by the person, whereas individuals are not directly aware of salience. Whether centrality or salience is the appropriate measure of importance is debatable. Stryker and Serpe (1994) show that both measures are relevant mediators of the influence of commitment on role behavior (see also Reitzes and Mutran 2002). They recommend that identity theory incorporate both constructs into its conception of role identities. Accordingly, both identity salience and psychological centrality hierarchies are depicted in my model of identity as shown in Figure 3.2.

How roles and identities are organized to form an integrated self is an important area of identity theory research (Reitzes and Mutran 2002). Self is conceived by Stryker (1980) as a hierarchy of roles, in which the rank of a role in the hierarchy corresponds to the likelihood that that role will be invoked in any given situation. That is, role salience provides the basis for ranking roles in Stryker's original identity theory framework. Importance, centrality and salience are the significant constructs that social psychologists have asserted as a means of organizing roles and identities into a conception of the self. The higher that these constructs are in one's identity, the more likely it is to have an effect on behavior. For example, "the higher the salience of an identity relative to other identities incorporated into the self, the greater the probability of behavioral choice in accord with the expectations attached to that identity" (Stryker and Burke 2000: 286). In general, identity theory conceptualizes multiple role identities in a hierarchy that comprises the self (Burke 1991; Callero 1985; McCall and Simmons 1978; Rosenberg 1979; Stryker 1980).

The relative ranking of a boomer professional's identity as a worker will affect the influence that restructuring has on their sense of self. Meanings that are associated with oneself in the work role connect or link meanings that are attached to restructuring and meanings that are related to behavior in one's work situation. Workers who place a higher importance on their work will experience change in the workplace differently than those who place less importance on their work. The concept of commitment as a determinant of a worker's hierarchical ranking of the importance of the work role provides an important line of questioning that will help explain disparities in the way worker's respond to aging and restructuring. For example, workers who experience downsizing with varying degrees of apprehension may convey different responses to questions aimed at examining their work commitment and where work fits in their role identity hierarchies. These concepts may also provide explanatory power in understanding what dictates the work situation that older workers experience as a result of restructuring. For example, my research may find that workers who assume contingent positions may differ in terms of commitment and importance from workers who become self-employed.

### ***Identity Meanings and Self-Motives***

Another general area of research on role self-investments involves the relationship between identity meanings and self-motives. Identity meanings are meanings that individuals attribute to themselves in a role (e.g., competent, confident, old, intellectually curious) or how they describe what it means to be them as role occupants (Burke 2004). Self-motives infuse identity meanings with a sense of maintaining a positive self-concept. The relationships are reciprocal in that self-motives affect identity meanings and identity meanings affect self-motives. Self-esteem is the most researched of the self-motive concepts and is a de facto standard of evaluating self-concepts (Cast and Burke 2002). However, self-efficacy and authenticity are also

valuable constructs (Gecas 1986). Figure 3.2 depicts the reciprocal relationship between identity and esteem, efficacy, and authenticity as self-motivations.

Self-esteem is a person's attitude toward the self. The attitudes can be positive or negative and contain both cognitive and affective elements (Rosenberg et al. 1995). Rosenberg (1979) asserts that protecting and enhancing one's self-esteem are important aspects of self-concept and identity theory. Gecas (1986: 138) defines self-esteem as "the motivation to view oneself favorably and to act in such a way as to maintain (protect) or increase a favorable view of oneself." However, as recently as 2002, Cast and Burke (2002) have maintained that identity theory lacks an adequate theory of self-esteem. They posit a framework that conceptualizes self-esteem in relation to internal identity processes. At a more abstract level, however, one's self-esteem is influenced by identity meanings and one's identity meanings are influenced by self-esteem. Reitzes and Mutran (1994: 316) note that, "The desire to confirm and support a positive self-esteem...motivates both identities and behavior." Individuals strive to protect, buffer, and enhance identity meanings relative to self-esteem. The efforts to accomplish these protection and enhancement objectives are an investment in identity meanings, on a global basis as well as in role-specific ways (Rosenberg et al. 1995).

Self-efficacy, a sense that a person can affect their situations and outcomes, is another form of self-assessment. Gecas (1986: 139) defines self-efficacy as "the motivation to perceive oneself as a causal agent in the environment, that is, to experience oneself in agentive terms." Individuals associate positive identity meanings with the perception of having agency and negative meanings with a loss of control. Identity meanings impact the sense of self-efficacy as well, which can influence behavior based on the perception of being or not being in control.



Authenticity refers to a person's sense that their identity is real and meaningful. The concept involves motivations regarding beliefs or values about the self. Gecas (1986: 141) notes, "Human beings not only live in a world of meaning, they are motivated to make their world meaningful." They assess their ability to do so based on beliefs about what is meaningful. Perceptions of a meaningful reality, of authenticity, influence identity meanings and identity meanings that reflect a meaningful reality provide a sense of authenticity.

Self-esteem, self-efficacy, and authenticity are primarily investigated as outcomes of or self-motives for identity meanings. These constructs comprise the primary ways that social psychologists have operationalized self-motives as role investments. With the exception of commitment, they represent ways that agency is introduced into role identities.

Self-investment constructs suggest ways that individuals add meaning to their roles. These ideas contrast with the notion of roles forming and evolving as a product of social structure. Roles are also individualized by a sense of what is important to the person. Roles are internalized based on external expectations for a given position, but they are internally ordered, protected, enhanced and instilled with personal motivations. As such, identity theory's roles are conceptually rich elements of identity.

Investigating the ways that boomer professionals infuse their work identities with self-motives will provide insight into the views of older workers, how agency potentially originates or is maintained, and processes that affect and explain older worker behavior. For example, workers who derive a sense of self-efficacy from their work, and then lose their job to outsourcing may be resentful on one hand. However, they may also be driven to find another job that provides a similar sense of self-efficacy. Perhaps they accept a lower-status job, but find the trade-off acceptable because they obtain what they need from the new job. Understanding

motives that influence older workers may provide significant insight into the type of situations that these workers are satisfied or unsatisfied with.

### **Identity Control Theory**

Stryker's structural symbolic interactionism has developed into two major strands of identity theory. Stryker's direction continues to examine "how social structures affect the structure of self and how structure of the self influences social behavior" (Stryker and Burke 2000: 285). The other major strand, developed by Burke (1991), focuses on how internal identity processes affect behavior (Burke 2006; Burke and Stets 1999; Stets 2006). Much of recent research in Burke's strand of identity theory has to do with identity control theory (ICT). Both strands remain prolific areas of social psychological research that link identity and behavior.

Burke (1991) asserts that identity is a process that functions as a control system. Identity determines behavior, but a feedback loop compares perceived self-meanings to an individual's identity meanings, the identity standard in Burke's terminology, to maintain control over situational behavior. When a person is involved in social interaction, they perceive the "reactions of others, form[ing] the basis for creating and confirming self-concepts" (Jaret, Reitzes and Shapkina 2005: 403). Individuals continuously compare meanings from the situation, that is their perceptions of themselves and how others view them, with their appraisals of themselves (Shrauger and Schoeneman 1979). They take the role of the generalized other in the form of a reflected appraisal. If perceived self-meanings from the reflected appraisal differ from the identity standard, the individual experiences stress and adjusts their behavior to bring the meanings into alignment. The basic ICT feedback loop is shown in Figure 3.3.

Identity standards are individuals' internally held meanings that establish goals or set a reference for self-reflexivity based on identity meanings. Burke (2000: 6) states, "These

meanings constitute the state of affairs that we strive to obtain and maintain as role occupants and group members.” Persons perceive who they want to be (in their roles) and constantly assess their behavior against their standard in this process, also referred to as self-verification (Burke 1991; Stets 2006). When situational self-relevant meanings do not align with their identity standard, individuals make an effort to bring the two into agreement. Doing so may involve attempts to change the situation or developing new situations that better match their identity standard (Burke 2004; Stryker and Burke 2000). Stryker and Burke (2000: 288) also note that “when persons interacting in a common situation have difficulties in verifying their identities, existing ties are broken and structures dissolve,” suggesting the source of stress when incongruence exists. Identity verification is achieved when perceived self-meanings are congruent with the identity standard.

In addition to explaining how behavior is mediated by identity meanings, these concepts provide identity theory with a process that explains individual agency (Burke and Gray 1999; Stryker and Burke 2000; Tsushima and Burke 1999). Tsushima and Burke (1999: 173) theorize that agency, in identity theory, is “a person’s ability to achieve internalized goal states represented in identity standards despite changing or opposing environmental conditions.” ICT posits the internal process that allows this to occur.

## **Identity Theory and Meanings Associated with Aging and Work**

### ***Age Identity***

How old a baby-boomer perceives their age to be, their age identity as opposed to their chronological age, is embedded in their biography. Their age identity is influenced by their experience in the boomer cohort as well as their own individual experience. For example, boomers have a cultural expectation of remaining active much longer than their parents, but

personal health problems limit this expectation. As Logan et al. (1992: 451) state, “age is a construct having social content and personal meaning.” Age also has clear structural constraints such as a person’s physical abilities declining with age.

Thus, a complex process influences age identity that has societal, cohort, individual, and temporal dimensions (Riley, Foner, and Waring 1988). Each aspect potentially involves dimensions of structure and agency that are fluid, constantly changing the meaning that we attach to aging. At the same time, the meaning that we attach to aging is constantly changing, blurring the line between structure and agency and changing our age identity in a reciprocal process. Age related behavior affects the shared meanings that people attach to aging and the shared meanings that people attach to aging affects age identity (Coupland and Coupland 1994; Coupland et al. 1991; George 1980; George, Mutran, and Pennypacker 1980).

Kaufman and Elder (2002) find that age identity changes as people grow older, noting that as people age the more likely they are to feel younger than their actual age. For example, 66 percent of those aged 65 and younger feel at least two years younger than their chronological age while 15 percent feel at least three years older than their actual age. For those 75 and older, 81 percent feel more than two years younger while almost none feel older than their actual age. Extrapolating their findings, people whose age is 50 have an average age identity of 46, 60 year olds feel about 54, 70 year olds feel 62, and 80 year olds feel 70 years old. That is, there is a divergence between actual age and perceived age as one grows older. Although this study does not specifically address boomers, those currently aged 44 to 62, it clearly shows that age identity is likely to vary with age within the boomer cohort.

Further variation with age is identified by Schieman and Campbell (2001), who find that older people report lower self-efficacy and self-esteem in addition to lower control over their

health. These findings hold for all adults of working age. The implication of the Kaufman and Elder (2002) and the Schieman and Campbell (2001) studies is that the boomer cohort cannot be treated as one homogeneous group. Different aged boomers think and behave differently. This is particularly evident when considering how boomers relate to major cultural events. For example, the oldest boomers were 23 during 1969's Woodstock festival while the youngest boomers were only 5 years old. Boomers clearly have varying cohort effects.

### ***Work Identity and the Meaning of Work***

To understand how aging boomers are also dealing with changes in the workplace, a similar conceptualization of the process involving work identity applies. The meaning attached to work and change in the workplace is also dynamic, having the potential to shape and reshape work identity at the societal, cohort, and individual level. Work identity at these levels, to differing degrees, in turn alters the meaning that we attach to work. For example, as downsizing occurs more frequently, and impacts larger numbers of workers, individuals view themselves as workers participating in a role that consists of less job security. The meaning of work, and workers' role identity becomes structurally defined as more temporary than career-spanning. Although the work role is established at a broader level than the individual, the formation of roles is dependent on individual meanings and perceptions.

As Gamst (1995: 1) asserts, "work dominates our psyches and social lives," creating forces that shape society and influence individual behavior. Work is a powerful factor in defining a person's self-image and also provides a significant milieu for social interaction. Through work we find individual value and purpose and social ties and status. Yet, in today's restructured economy, "confusion and ambiguities about its meaning, nature and purpose in our lives are widespread" (Pahl 1988: 1). Work is dominant in our self-perceptions and the social networks

that we have access to, yet the powerful meanings that we attach to work are in a state of flux for today's worker.

For example, with downsizing having become so prevalent, a cultural means has emerged of buffering the unemployed job seeker from the power and emotion of being asked "What do you do?" The new answer, carrying no judgment for anyone in the conversation, is that "I am in transition." A new definition of the situation has emerged that grants temporary unemployment an acceptable status. Unemployed workers protect their self-esteem and maintain their social status and the networks that the status entails.

Applebaum (1995: 47) observes aspects of work that have not changed as follows.

Work is the cooperative effort of humankind, the sharing knowledge and skill to create our human-made world. Work is still associated with self-esteem, social progress, and quality of life. Work is still the precondition for releasing people to enjoy self-fulfilling leisure. Work is still associated with maturity, self-discipline, and moral values. For all these reasons, work is the precondition for the human condition.

## **Summary**

This chapter presents identity theory concepts of use in the examination of processes that affect older workers. In particular, I used this theory to attain my objective of explaining processes that contribute to specific outcomes in the careers of boomer professionals. Specifically, I adhered to the identity theory assertion that behavior can be understood as the product of structure mediated by identity. Within this framework, I identified the structure that is especially influential in the formation and maintenance of boomer professionals' worker role identities, paying particular attention to worker role identities that have been affected by economic restructuring and aging. I also considered more agentive processes such as self-motives and lingering identities, and examined their impact on these role identities. I then analyzed the career outcomes that participants in

this research have experienced using identity theory concepts to explain the outcomes and explore variation between the different outcomes. Identity processes with both structural and agentive origins were used to compare and contrast employed workers, that is, those who are categorized as being traditional, independent, reinventor, or contingent.

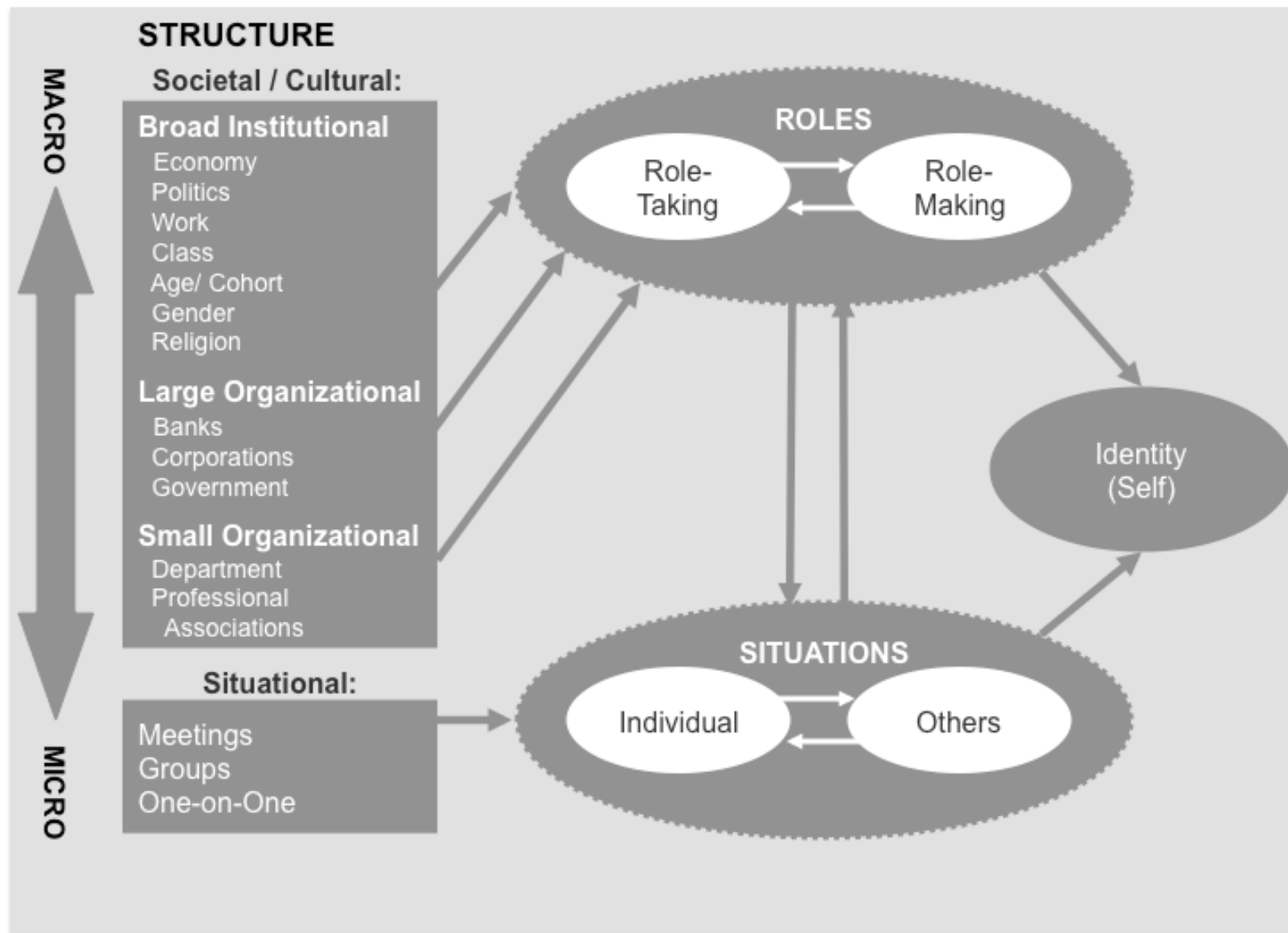
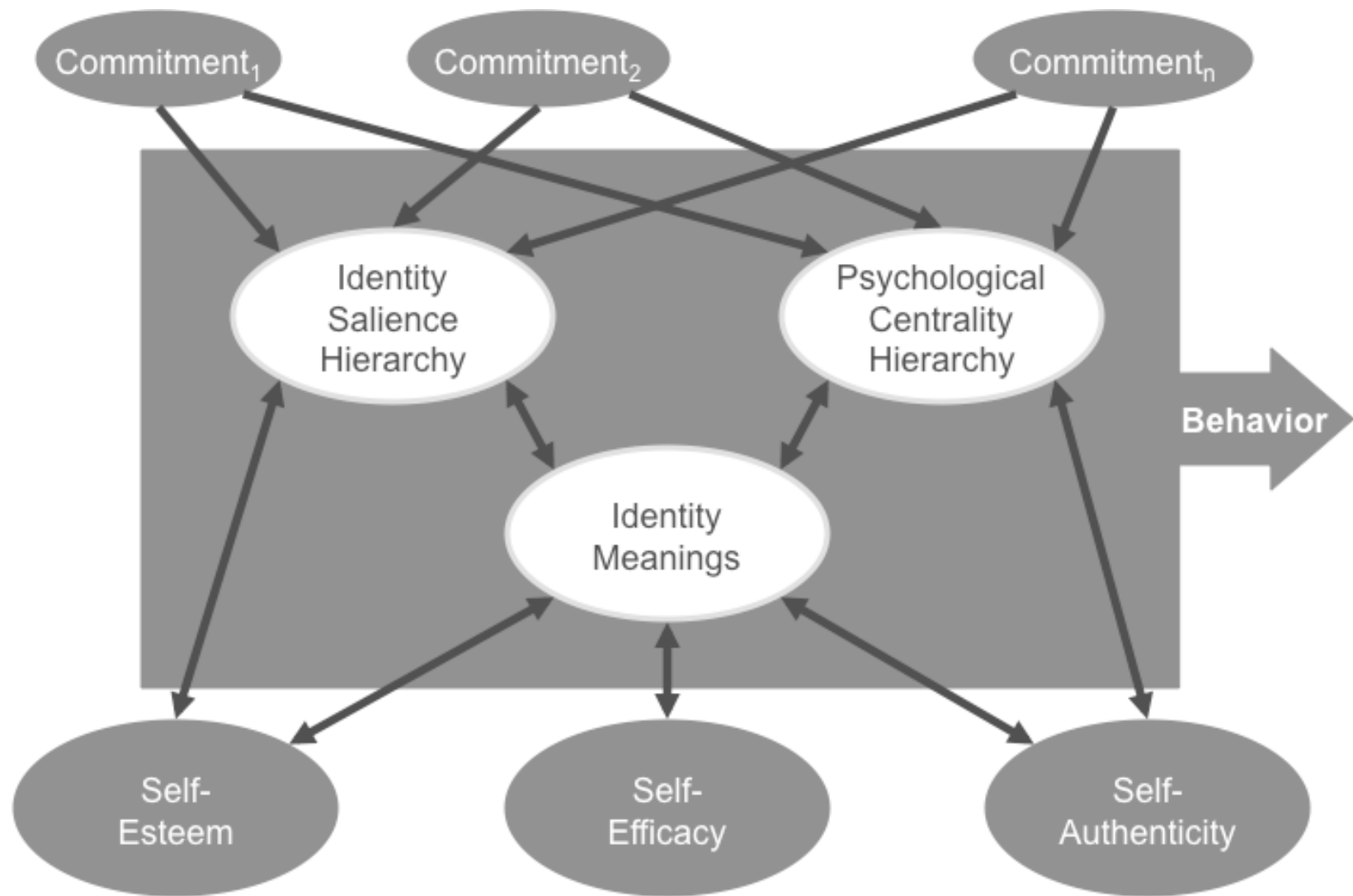
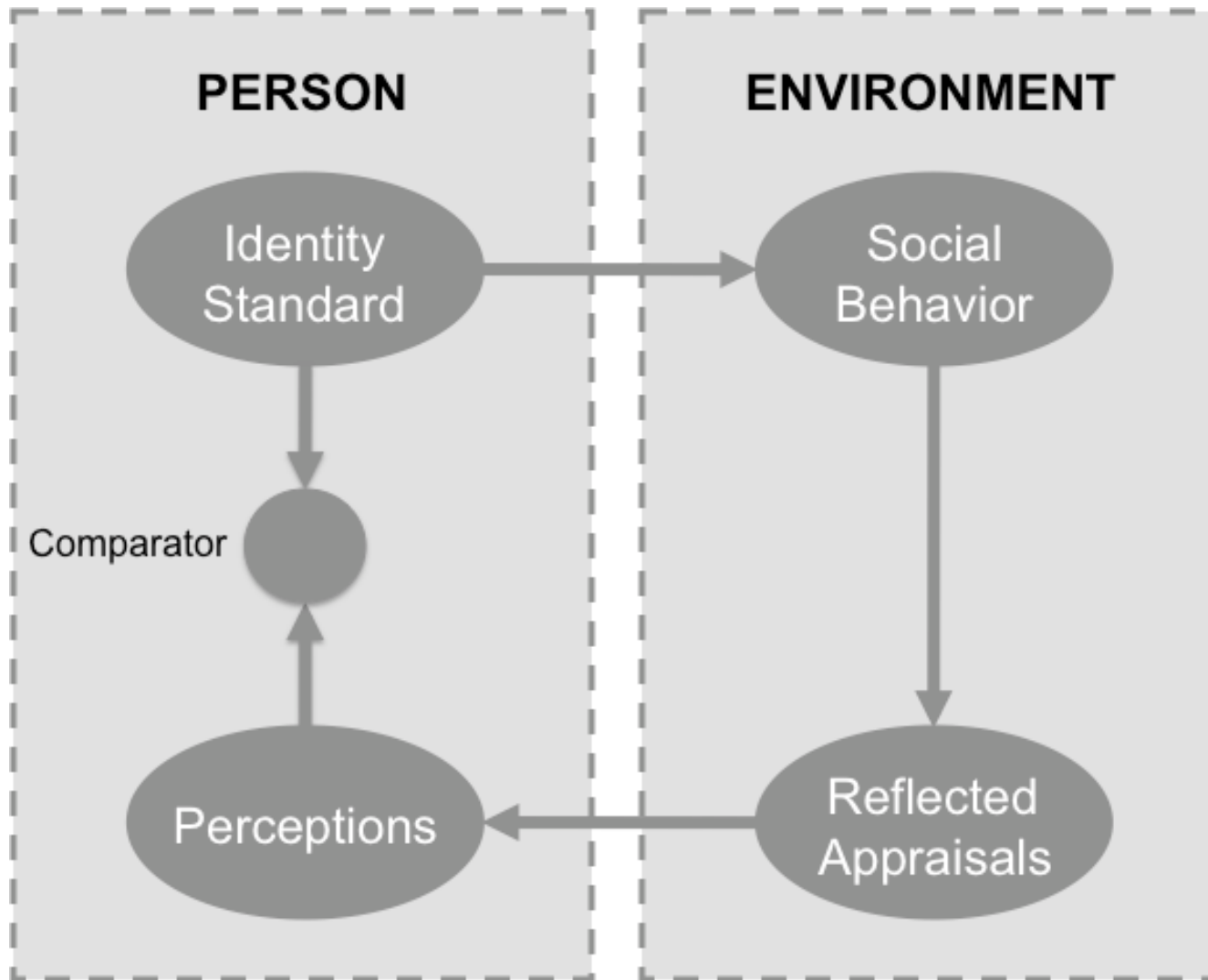


Figure 3.1. Identity Formation and Development.





**Figure 3.2. Identity Self-Investments**



**Figure 3.3. Identity Control Theory System**

## CHAPTER 4 - DATA AND METHODS

The overarching objective of my research is to examine the combined effects of aging and restructuring as they relate to boomer professionals' identity and their career outcomes. Four points defined the research question as follows:

1. What are the implications of the combined effects of economic restructuring and aging on boomer workers and how do these effects influence worker behavior?
2. What are the associated structural effects that affect boomer workers and to what extent are these forces perceived as constraining? Similarly, what effects originate with individual agency and how does agency influence workplace restructuring and perceptions of age in the workplace?
3. To the extent that structure is found to affect worker identity and outcomes, what are the processes involved, and what are the origins of this structure? How does agency take shape and what processes guide the interplay of structure and agency?
4. How do these identity effects compare and contrast across different types of work situations frequently encountered by older workers, particularly as evidenced by meanings that workers associate with their individual outcomes? Do self-meanings align with meanings attached to career meanings, and if not, what are the ramifications?

This study consisted of a qualitative analysis of in-depth interviews with 33 participants. A requirement for interviews with considerable depth, an ability to tailor the inquiry to individual narratives, and an emphasis on process suggested qualitative methods (Berg 1998; Weiss 1994). Snow (1999: 98) notes, "one of the traditional contributions of qualitative/ethnographic research to social psychology has been its capacity to access and illuminate basic social processes."

Many studies have applied quantitative methods to various aspects of work, aging, and identity theory (e.g., Burke and Reitzes 1981; Jaret et al. 2005; Logan et al. 1992; Reitzes and Mutran 1994, 2002, 2004, 2006; Simon 1997; Wheaton 1990) and measurement techniques have been developed (Burke and Tully 1977; Mutran and George 1982; Rosenberg 1979; Stryker and Burke 2000). However, a rich qualitative literature also exists on the effects of restructuring (e.g., Dudley 1994; Leventman 1989; Milkman 1997; Newman 1988; Perrucci et al. 1988; Smith 2001) and social psychology (Ebaugh 1988; Kaufman 2003; Lois 1999; Milkie 1999; Ponticelli 1999; Tsushima and Burke 1999). These examples suggest that both methods are effective in different situations; however, the stated research objectives and my desire to interpret meanings associated with workers' experiences led to the selection of qualitative methods for this particular research. Qualitative methods facilitated the proposal of relevant theoretical assertions that can be tested with future research. Opportunities for further research are identified later that are well-suited to quantitative, as well as qualitative methods (Abbott 2003; Baronov 2004; Creswell 2003; McKeown 2004).

Tsushima and Burke (1999) use qualitative in-depth interviews to determine meanings, investigate individual agency, and to refine identity theory. Vallas (1999) uses qualitative in-depth interviews to assess situational worker behavior in a blue-collar environment. These articles establish a precedent for applying qualitative methods to key aspects of this research objective and these studies contribute to refining these methods.

This research design was based on developing an understanding of boomer professionals in the era of restructuring by examining the meanings that they attach to themselves and their work.

My plan stemmed from a desire to understand how professionals from the baby boom generation are negotiating dramatic changes in work coupled with an identity theory framework that was established as particularly useful for this inquiry.

Identity theory suggests that the structure that emerges at higher levels, such as institutional structure, is integrated into individual systems of meanings, leading to shared meanings that reflect the higher order structure. That is, macro-level phenomena are interpreted in the meanings that individuals attach to objects, their environment, themselves, and their behavior in micro-level social interactions. For example, I expected downsizing to be reflected in individual meanings held by workers, such as a sense of reduced job security, distaste for company downsizing, or mistrust of foreign competition for jobs.

Situational interaction also creates social structure that originates with individuals, as opposed to the organizations and institutions cited thus far in this example. For example, occupations have been redefined to involve more networking across company lines in lieu of a previous reliance on internal labor markets for job mobility. Forums have been created to facilitate this new form of networking. Web-sites have been developed that help workers to network. Career trajectories begin to depend on external networking. In short, social structure is constructed at the micro-level that both integrates with and adds to macro- and meso-level structure that is reflected in individual meanings. Interpreting individual systems of meanings provided a lens to examine the boundaries that are established by all levels of social structure. By understanding meanings associated with economic restructuring and aging, I gained insight into the effects of all forms of social structure related to these phenomena.

A second identity theory tenet that informed this research design is that individual behavior in the workplace is expected to be determined by individual self-meanings associated

with work, that is, by individual role identity as a worker. This is also a basic symbolic-interactionist perspective (Blumer 1969; LaRossa and Reitzes 1993) that applies to identity theory (Stryker 1980; Stryker and Burke 2000). Continuing the downsizing example, identity changes resulting from downsizing, as a social phenomenon, may be exhibited in behavior such as fear of job loss, increased stress, or reduced self-efficacy. More intense identity and behavioral changes may occur if the individual themselves is downsized. Identity theory states that self-meanings and behavioral meanings are directly related.

Combining these two tenets of identity theory suggests that social structure associated with economic restructuring and aging is reflected in individual meanings attached to economic restructuring and aging, that meanings attached to economic restructuring and aging influences self-meanings, and self-meanings are directly related to behavioral meanings (see Figure 1.1). Using identity theory as a framework for my research design, data was collected from interviews with boomer professionals that involved four foci as follows:

1. Meanings attached to economic and workplace restructuring
2. Meanings attached to aging in the workplace
3. Self-meanings as a worker (role identity)
4. Meanings associated with career outcomes in the restructured workplace

These data allowed the investigation of the effects of economic restructuring on boomer professionals while narrowing the focus of the investigation based on identity theory. The data were structured in the sense that the examined information was linked in a theoretical process advanced by identity theory.

My research design had two additional advantages beyond being structured and focused (George and Bennett 2005). First, the interviews provided general data on the aspects of

economic restructuring and aging, supplying primary data used to develop new theory and extend existing theory using grounded theory methods. Second, the data were collected in a way that facilitated comparison and contrast between meanings held by individuals in different career outcomes. This research design provided a great deal of flexibility while maintaining a focused approach to data collection.

### **Sample**

Because this research is focused on the effects of restructuring, the types of career situations investigated were limited to those associated with large corporations. The outcomes involved situations in which workers were corporate employees, sought to become corporate employees, or involved former corporate employees. For example, workers who had left a company and now contract their services back to that company were included. Workers who had rejected the corporate world for some other alternative following a corporate career, were also included. Overall, the scope of my research was limited to situations and workers with a corporate context.

Much of workplace transformation has centered on shifts in the way work is performed in large organizations (Edwards 1979). The largest potential for cost-cutting exists in bigger organizations (Budros 1997). Corporations are pressured by stockholders, institutional investors, and the perceptions of Wall Street to improve profitability and are faster to implement changes as a result. Large corporations, in particular have led the way in implementing workplace restructuring (Gittleman, et al. 1998). Smaller, publicly-held firms, privately owned companies, and public-sector organizations are all being affected by economic restructuring, but have been slower to change. Smaller firms, such as partnerships and sole-proprietorships, especially those that are in the corporate supply chain, experience restructuring impacts, but on a much smaller

scale than large companies. Start-ups and corporations with smaller market capitalization are generally more focused on growth than profitability and consequently have priorities other than restructuring (Cornfield et al. 2001).

Within the corporation, both blue-collar and white-collar workers have experienced many changes during the era of restructuring. The impacts on these two types of worker are quite different, thus their responses can be expected to be very dissimilar. For example, changes in the implied employment contract have different meanings for the unionized wage-worker whose job security hinges on seniority compared to the salaried worker who is employed at will. The early years of restructuring had a disproportionate effect on blue-collar workers as manufacturing was decimated in the U.S. and large numbers of jobs were moved off-shore (Bluestone and Harrison 1982). Recently, however, in part because of the decline of manufacturing and partly because of shifting corporate focus; white-collar workers have been more affected by restructuring. Also, in today's labor market, white-collar workers comprise a much larger proportion of the workforce than blue-collar workers. In 2000, 63 percent of boomer occupations were classified as white-collar, while 37 percent were blue-collar and lower-skilled services. Of the white-collar workers, 73 percent (46 percent of all occupations) fit my definition of professionals (GAO 2001).<sup>4</sup>

The percentage increase in boomer-aged workers is growing much faster in white-collar jobs compared to blue-collar jobs. The occupations with the highest growth among workers 55 years of age and older, between 2000 and 2008 (projected), are managerial and professional. The lowest growth is in manufacturing related occupations and technical occupations. Combined, the professional and managerial occupational categories increased from approximately 5.8 million workers to 9.0 million during that time. These data indicate the beginning of the effects of

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<sup>4</sup> These data are based on the age group between 40 and 54 years of age. Technically, boomers were between 36 and 54 in 2000, but this data from the March 2000 CPS is a reasonable representation of the boomer occupational distribution.



boomers as higher educated workers involved in higher status, particularly professional, occupations. 29 percent of boomers have a college degree, compared to 21 percent for the “mature generation,” the older cohort classification just before the boomers. 57 percent of boomers have some college compared to 42 percent of matures (Toossi 2002). The boomer as older worker phenomenon is largely about college educated professionals.

For these reasons, this research focused on professional and managerial workers employed in a corporate context. Because managerial workers are largely undifferentiated from professional workers in today’s workplace, a process that Leicht and Fennell (2001) characterize as professionalization, the types of workers studied are simply referred to as professionals.

Professionals are a particularly interesting group to study in assessing the relationship between restructuring and worker identity. They contrast with blue-collar, lower-skilled service workers, and administrative and technical support workers in three ways. First, they are likely to have accumulated more human capital, in the form of education and occupational status and obtained more social capital, in the form of networks and connections with other workers. Second, they are likely to have achieved higher levels of income and wealth. Third, they are likely to have attained a level of success in the workplace that may influence their current identity via lingering identities (Kaufman 1982; Perrucci and Wysong 1999; Reitzes and Mutran 2006). These factors suggest that professionals may be more likely to exhibit individual agency when faced with change or adversity. It is possible that they are more likely to have the means and self-concept necessary to exert agency in coping with the effects of restructuring. Consequently, focusing on professionals also makes sense for exploring the structural and agentive aspects of how workers are responding to restructuring.<sup>5</sup>

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<sup>5</sup> During the human resource era of work, beginning in the 1970s, exempt (i.e., salaried and exempt from hourly overtime laws) employees have generally foreshadowed workplace culture. Benefits typically would accrue

Boomer professionals working in a corporate context are affected by five predominant tactics associated with restructuring. These are employment externalization, reengineering, mergers and acquisitions and consolidation, deskilling, and downsizing. To varying degrees, each of these tactics either eliminates or devalues jobs.<sup>6</sup> Devalued jobs may be downgraded in terms of compensation (pay and benefits), hours worked (shifting from full-time to part-time or requiring fewer part-time hours), or job quality (e.g., less desirable work conditions or work schedule). Devalued jobs are often downgraded in multiple aspects.

Workers whose jobs are eliminated or devalued respond differently from one another. Many try to “stay the course,” holding onto to traditionally defined work roles by gaining or seeking reemployment in traditional career-oriented occupations. Others take more a more autonomous direction, leveraging their skills as an independent contractor or becoming entrepreneurs of their own businesses. Some embrace change by training for a new occupation or direction in their career. Still others gravitate to what is available, accepting employment that is most easily accessible. I used these career outcomes as the key criteria in defining categories of work arrangements to investigate, knowing that the categories may change based on my findings. The traditionally employed are separated from those who are seeking to return to traditional employment (i.e., “in transition”). Also, autonomous workers are separated into those who have taken an independent path as self-employed or contracting and those who are redefining their

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temporally to exempt employees first, then to non-exempt, then to hourly workers. Therefore, some findings from research involving professionals may extrapolate to future trends for workers in general. It is unlikely that the reverse would be true, providing additional justification for studying professionals (Leicht and Fennell 1997).

<sup>6</sup> All jobs are not devalued due to restructuring tactics. For example, demand has increased for legal and financial merger and acquisition experts as a result of increased mergers and acquisitions in the restructuring era. The creation of occupations and jobs in high-skilled services is far outweighed by unemployment and underemployment across all industry sectors. The relatively few worker outcomes that represent improvements due to restructuring are not the focus of this research.

skill-set with a goal of reinventing themselves as an employee. The five categories of worker sampled are as follows:<sup>7</sup>

1. *Traditionals* - Workers who have reestablished themselves, or that remain on, a traditional career trajectory.
2. *Transitionals* - Workers in-transition from a traditional career trajectory who are seeking a similar position. These are workers who are in the job-search process. They are generally unemployed, but may also have taken temporary employment as a short-term solution. This category is distinguished by workers who expect to reestablish themselves in a job at a similar level to the job from which they were downsized.
3. *Independents* - Workers who are self-employed or contracting following a traditional career. Again, these are workers who expect to reestablish their career status. However, they are distinguished by either of two characteristics. First, they may be willing to leverage capital gained from their previous employment to “get a new start.” The capital involved may be savings, business contacts and connections, or specific skills. Second, they may wish to escape direct corporate employment.
4. *Reinventors* – Workers involved in reinventing their career (e.g., training for a new occupation). These workers also expect to reestablish their perceived career status. However, they are distinguished by a willingness to retrain. They may aspire to a job that is a better fit for them at this point in their life course and are not necessarily seeking

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<sup>7</sup> The U.S. Census Bureau’s Current Population Survey uses four categories of alternative arrangements to identify contingent workers: (1) independent contractors (including consultants and free-lance workers); (2) on-call workers, (3) temporary help agency workers, and (4) workers provided by contract firms (Cohany 1996). All other workers are considered to be traditional. In an analysis of younger workers in nonstandard work arrangements, Rothstein (1996) uses the following categories: (1) full-time regular employee, (2) part-time regular employee, (3) self-employed regular employee, (4) temporary agency employee, (5) temporary direct hire employee, (6) consultant, and (7) contractor. My categories differ, largely because they are aimed specifically at professional employees.

compensation commensurate with their previous career. They may remain employed as they learn new skills or credentials.

5. *Contingents* - Workers engaged in contingent employment following a traditional career.

These workers are in positions that are devalued in comparison to their previous job.

They may not have fully accepted this outcome, but they are actively engaged in their lower-level work and do not have short-term expectations for an improved position.

Because analysis for this research, discussed below, applied grounded theory methods the sample size was not completely pre-determined. From a practical standpoint, less than 30 interviews were likely to provide insufficient data and more than 40 interviews were likely to create an unwieldy analysis. However, the notion of theoretical sampling asserted by Strauss and Corbin (1998: 206) suggests that the sample size in grounded theory be dictated, at least in part, by how the coding phases progress.<sup>8</sup> During open-coding, they state “the aim of data gathering...is to keep the collection process open to all possibilities. This was achieved through sample diversity by including a variety of work situations and worker demographics. This approach to sampling resulted in a rich set of variables that emerged from this coding phase.

Once the variables that best related to the research objectives were identified, the goal of the sample became to add depth to the variables through data that explained the variation of concepts and the relations between concepts, while better articulating the variables. These are the objectives of sampling during axial coding, which may necessitate additional data collection. The theoretical story then emerges during selective coding, at which time; additional sampling may be required to flesh out the emerging theory. In theoretical sampling, no additional sampling is

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<sup>8</sup> Open, axial, and selective coding are analytical phases used in grounded theory methods. I only briefly introduce these phases here as they relate to sampling. Later, in the section on analysis, I discuss these steps in more detail.

required when all variables are saturated. According to Strauss and Corbin (1998: 212), a variable is saturated as follows:

- (a) no new or relevant data seem to emerge regarding a [variable]
- (b) the [variable] is well developed in terms of its properties and dimensions  
demonstrating variation
- (c) the relationships among [variables] are well established and validated.

The need for additional sampling once data collection and analysis is in progress depends on how well “the initial decisions fit the reality of the data” (Strauss and Corbin 1998: 204). After analyzing approximately 26 interviews, it became apparent that the variables were well developed, however; additional interviews continued to provide supporting data for the variables involved. I concluded that the variables in my analysis were fully saturated after 33 interviews.

Nonprobability sampling was used to collect data from these 33 in-depth interviews conducted with boomer professionals who have had a long (over ten years) tenure working in a corporate environment. The sample consisted of participants from five different groups, with each group being made up of participants whose career situations were categorized as being similar based on rationale described above. Participants were not all currently working, but had been actively employed within the past five years. All respondents were born between 1946 and 1964 (i.e., boomers who are at least 45 years old) and have worked in a professional capacity for a significant portion of their career. Although technically the baby-boom generation ends with those born in 1964, those who could have been 44 years old at the time of the interviews, I chose not to include workers younger than age 45 in the sample. The interviews emphasized aging effects that have been experienced by older workers, legally those who are older than the age of 40. Using a lower limit of 45 years old assured that participants had spent at least five years in

the workforce—beyond the age of 40—during which they had potentially been exposed to age-related workplace phenomena prior to participating in this research. For example, a worker who loses her job at age 40, spends two years in transition, and three years in a new job, will be 45 with five experiential years beyond the age of 40. Less than five years may not be adequate to fully develop meanings associated with the goals of this research.

The participants were obtained in a purposive sample from contacts and networks that I have established in the Atlanta business community over a 30-year professional career. So many professionals, today, have been affected by downsizing that maintaining an active network of contacts is common. By connecting my network to others' networks I was able to efficiently obtain a chain referral sample. I explained my research to known contacts via email and asked them to introduce me (by email) to workers in their network that met my criteria. Leveraging this “warm introduction,” I then contacted these prospective respondents to determine if they were interested in participating. A time and place for an interview, typically at Starbucks, was then established with those who were agreeable to participating. With this approach, 30 of the 33 interviews were with people I had not previously met. The recruiting synopsis, which I shared with prospective participants, is included in Appendix I.

After the interviews were completed, it was clear that classifying respondents was difficult because many participants had been in multiple categories at various points in their career. In fact, one participant fit into each of the five categories at least once in his career. Further, the category that participants or their close associates had previously described did not always match with my assessment of their career situation. For example, several workers were working in Limited Liability Corporations (LLCs) that they had formed in order to perform work on a contract basis without going through a recruiter (e.g., a temp agency or a search firm). Some

of these workers had been recruited as independents, but most were severely underemployed in comparison to jobs that they had previously held. I categorized these workers as contingents rather than independents. On the other hand, some employees who were recruited as being in transition (transitionals) were actively positioning themselves to start their own business (i.e., they were on an independent path, but were still technically unemployed).

An example of the difficulty with categorizing boomer professionals is Wes Young. Wes had a previous successful career in traditional roles with several technology companies. Following his next to last traditional job, which involved an acquisition that, although financially lucrative for Wes, eventually led to a mutually agreed upon separation from the company. After a period of transition he entered his current job at the time of the interview, which was a traditional job that paid considerably less than he earned in previous jobs. He accepted this current job, working with technology start-ups, because his personal goal was to create a start-up of his own. He had profited nicely from two former jobs as a traditional employee and wanted to create that potential for financial gain with his own company. Wes, then, was currently employed in a traditional role, but by definition was underemployed in comparison to his earlier career, and his objectives and actions were aimed at becoming an independent.

The careers of boomer professionals were often fluid, sometimes convoluted, and generally difficult to categorize. In the example above, Wes was recruited as a reinventor because I had understood that he was moving from the corporate world to an alternate career path. After the interview, I continued to classify him as a reinventor because he was in the process of reinventing himself as a business owner, but did not have a concrete business venture defined at the time of the interview. However, in subsequent analyses, where I projected

participants' career outcomes based on the path that they were most actively and most successfully pursuing, I classified him as an independent.

As a result of these types of classification complexities, the sample is shown in three stages in Figure 4.1. First, is the category distribution based on information available at the time of *recruiting*, then the modified *post-interview* distribution of categories that was based on having full information from the interviews is shown, and then the *projected* category distribution based on an assessment of the career path that was most likely for the participant is shown. When taken as a whole, Figure 4.1 demonstrates the variability and the breadth of the sample.

All of the participants experienced a major career transition beyond the age of 40. In all but three cases, the transition involved an unexpected interruption in his or her traditional career trajectory. That is, they were downsized or transitioned to a contingent position. The three exceptions to unplanned career interruptions experienced voluntary transitions associated with becoming older workers in the restructured economy. Table 4.1 shows the participants' employment status at the time of the interview. Those who were underemployed were all actively seeking an improved situation. Therefore, they were categorized as being in transition. Table 4.1 shows the transition status of the participants.

Although the sample is not sufficiently large to be generalized to a population, I planned to make theoretical generalizations based on this sample. In Richardson's (1990: 55) terms, my goal was to "make *limited* claims for the statistical *representativeness* of my findings—but *unlimited* claims to their *generality* and *theoretical significance*." Specifically, I expected my results to provide the basis for theoretical assertions. For this reason, every attempt was made to obtain a sample that represented the diversity of boomer professionals. Table 4.2 depicts the



diversity of the sample. Approximately 60 percent of the sample was comprised of men and 40 percent comprised of women. The objective was an even mix of men and women, but I did not turn down the opportunity to interview a man with an interesting post-age 40 career. The resultant mix obtained along gender lines is quite diverse and the narratives obtained were extremely informative.

Slightly over 12 percent of the sample was black. This group was equally split between men and women. The remaining 88 percent of the sample was white. A fairly even distribution of ages within the target boomer age range (45-63) was achieved. I divided the target range into three roughly equal age groups: 45-50, 51-57, and 58-63. Using these cutting points, each age group consisted of one third of the participants.

There was also considerable variation in education, also shown in Table 4.2. I categorized the ranking of the universities that participants attended according to *U.S. News and World Report's* ratings of colleges. I placed the top 40 universities in category one, the second tier, 41-80 in category two, the third tier, 81-121 in category three, and the remainder, rated but not ranked by the magazine, as category four. Thirteen participants attended category one universities, 11 attended category two schools, and nine attended category three and four schools. Graduates of better ranked schools were more likely to have had long professional careers that lasted into their 40's, 50's, and 60's and thereby qualify for my sample. Of the participants there was one PhD, one Jurisprudence degree, 10 MBA's, five Master's degrees, 15 Bachelor's degrees and one Associate's degree.

A range of professions were represented in the sample as follows: seven business, six marketing, five sales, five engineers and computer scientists, two advertising, two human resources, and six miscellaneous. Industries represented include nine technology, seven food and

beverage, four power and utilities, two packaging products, two entertainment, two advertising, and seven miscellaneous.

## **Data**

Boomer professionals were recruited, using chain-referral sampling, that fit the five worker categories based on either self-descriptions or the descriptions of the referent who was familiar with their situation. Using this approach, I recruited six traditionals, seven transitionals, six independents, seven reinventors, and seven contingents. This distribution is shown in Figure 4.1 as the recruiting sample.

The interviews were semi-structured, consisting of open-ended questions that followed an interview guide such that all interviews were conducted in a somewhat consistent manner. The interviews were completed between February and June of 2009. The interview plan and guide are included in Appendix I. The guide also lists several topics that I had identified as potential areas for deeper probing depending on the content of the individual interview (Weiss 1994). The questions were aimed at teasing out the meanings that participants associate with aging, economic restructuring, themselves (identity), and their work situation. The interview questions addressed the following areas: (1) biographical information, (2) the importance of work, (3) perceptions of economic and workplace restructuring, (4) perceptions of aging, (5) age-related self-meanings, (6) work-related self-meanings, (7) current work situation behavior, and (8) stress, well being, and satisfaction.

The interviews lasted about 75 minutes on average, with some approximating two hours. I recorded each interview on a LiveScribe pen, which had the advantage of being unobtrusive while providing an electronic record of the interview. For purposes of privacy, the recordings do not include the participant's name. A master list was maintained that cross-references the

participant's name to the date of the recording. All other documents used an alias to refer to the participant.

Because interviews were conducted at one point in time, this research employed a prospective and retrospective design. Much of the data of interest were prospective in that current perspectives were of primary importance. However, in understanding biographical information that contextualizes current perspectives, a retrospective design that depends on each respondent's recollections of past events was used (Scott and Alvin 1998). Participants seemed to have a very clear recollection of past events as careers held substantial meaning for everyone involved in the study.

All respondents signed a consent form prior to being interviewed as part of the informed consent process. The informed consent form is attached in Appendix II. The form served to document consent and as a tool to initiate a discussion of full disclosure with each respondent. Disclosure for this project consisted of a description of the research being conducted, the purpose of the research, steps that will be taken to protect participant's privacy, a clear statement regarding the voluntary nature of their participation, and an offer to answer any questions that he or she may have.

- 1) This research was described as a study of how professionals from the baby-boomer generation are dealing with workplace change along with growing older.
- 2) The purpose of the research was stated as meeting the requirements of my dissertation with intent to publish journal articles and a book based on the study.
- 3) Privacy and confidentiality, for this project, consisted of protecting the privacy of respondents and maintaining the confidentiality of the data collected. I explained that they would be given an alias and that the alias would be the only name associated

with the data. Their real name would not appear on the recording of the interview, subsequent transcripts, or written reports concerning the research. I kept one copy of a master list that contained real names and contact information along with their alias in the event that I had follow-up questions. The list was kept only in my possession. Along with signed informed consent forms, the list was kept in a locked file cabinet that only I had access to.

- 4) I explained that participation is entirely voluntary, that the consent form only indicated their agreement to enter the interview process, that they were not required to answer any question that they did not wish to answer, and that they could end the interview process at any time that they wished. All of the interviews proceeded as planned, although tears were shed on more than one occasion.

## **Analysis**

Each interview transcription was at least thirty pages long. I found working from the transcriptions to be very useful, especially during the early stages of analysis. However, I also found that playing back the recording provided a somewhat different perspective during analysis. That is, I found that I noticed different things when working with transcripts compared to working with recordings. As a generalization, words and phrases were more apparent using the transcripts and context was more apparent using the recordings. I relied more on the transcripts early in the analysis and more on the recordings later in the analysis.

I used a system of memoing in which I kept a master file with all of my notes (memos) during analysis of indicators and concepts. Whether the notes originated from reading the transcripts or from listening to recordings, I documented the notes in the memoing file. At first I went through the transcripts and marked everything that I thought was important. I kept notes in

the margins. However, I soon found that I preferred to note things directly into the memoing file. The final version of my memoing file consisted of approximately one hundred pages of typed notes organized by variable. When I was analyzing how the variables interrelated and working to develop the theoretical story that emerged from the data, I began to use a lot of hand-written notes, which seemed to better facilitate spontaneous ideas.

The analytical focus involved the examination of meanings as verbally conveyed by the participants. Of course, these meanings were stated using language that I needed to interpret. Qualitative grounded theory methods were a particularly useful approach for assessing these types of data; therefore grounded theory methods were applied as my primary set of analytical tools. Using grounded theory coding procedures, as delineated by LaRossa (2005) and Strauss and Corbin (1998), I followed systematic steps to develop theory from qualitative data contained in transcripts and recordings of the in-depth interviews. Using grounded theory methods provided structure to the analysis that helped to assure that I captured the theoretical story emerging from the data.

Grounded theory procedures consist of three phases of coding as delineated by LaRossa (2005) and Strauss and Corbin (1998): open coding, axial coding, and selective coding. Coding procedures guide the analysis by providing detailed steps for extracting increasingly abstract information from detailed data.

First, the data were “opened up” in open coding by identifying indicators/incidents that point to concepts (labeled phenomena). LaRossa (2005: 841) summarizes open coding as follows:

The rudiments of open coding are captured in what Glaser (1978, pp. 62-63) called the *concept-indicator model* (see also Strauss, 1987, pp. 25-26). The concept-indicator model is predicated on the constant comparison of indicators, that is, on regularly identifying similarities and variations in texts. The “basic,

defining rule” of constant comparison is that, while coding an indicator for a concept, one compares that indicator with previous indicators that have been coded in the same way. An *indicator* refers to a word, phrase, or sentence, or a series of words, phrases, or sentences, in the materials being analyzed. A *concept* is a label or name associated with an indicator or indicators; stated another way, a concept is a symbol or conventional sign attached to a referent.

During open coding, concepts are also constantly compared and grouped based on similarities or commonalities. Strauss and Corbin (1998) refer to the grouped concepts as categories while LaRossa (2005: 843) prefers to call them variables, emphasizing that the focus of the analysis is variation that facilitates the generation of theory as opposed to a more descriptive analytical result.

The grouping of concepts further increases the level of abstraction at which the researcher works, moving from indicators to concepts to groups of concepts. Throughout this process, the researcher influences the qualities and quantities of concepts that are delineated. The researcher brings preconceived notions of what concepts are important based on sociological paradigms and theoretical perspectives that they embrace. Qualitative aspects of the data are controlled, however inadvertently, by the researcher doing the analysis. The researcher also determines the number of concepts that are identified depending on the level of abstraction that makes sense to the analyst. Grounded theory analysis is, then, very much the product of the person or persons performing the analysis (LaRossa 2005; Strauss and Corbin 1998).

In the open-coding phase I was very much influenced by using an identity theory framework and by my preconception that aging and economic restructuring are significant structural influences on boomer professionals. During open coding it became clear that aging and economic restructuring were not expressed as being as influential as I had hypothesized. They were important, but a group of concepts that I eventually grouped as adaptive distortions began to emerge as particularly dominant structural influences.

Separately in the analysis was the emergence of what I considered self-motives as the primary variables in determining transition outcomes. In working with the associated concept-indicators for these variables, I became convinced that both structural and agentic components of self-motives were involved. Yet existing theory characterized self-motives primarily as a source or pathway for agency to be infused into a role identity. I revisited the literature and began to describe this variable as personal resources that have a structural and agentic dimension.

My preliminary thinking about transition as a role that workers occupy also emerged from my work in open-coding. I had not envisioned transition in this way until it emerged from my grounded theory analysis. Many other concepts and variables emerged from this phase of analysis. Many were discarded later as the major theoretical story and overall process began to fall into place. However, many others are described in my findings, either supporting my findings or providing cues for areas that need additional research.

Coding continues “around the axis” of variables in axial coding, focusing on how they relate to one another. The six C’s are often cited as the key to axial coding: causes, contexts, contingencies, consequences, covariances, and conditions. That is, the researcher investigates each variable in relation to other conceptual groupings, in effect developing propositions regarding those relationships based on the data.

During axial coding it became clear that multiple theoretical stories were emerging from my data. While I ultimately integrated the theoretical stories into a cohesive set of theoretical assertions, during much of the analysis I worked with separate emerging theoretical stories that I referred to as “themes.”

I focused on process in the axial coding phase,. The relationship between variables began to make sense in terms of broader themes and the broader themes began to make sense in terms of an overall process. This was the most interesting part of the analysis for me because a cohesive process started to come into view. I had themes related to structure that influenced boomer professionals, the notion of transition as a separate role from the work role rather than merely an ill-defined role-transition between work roles, the importance of personal resources in negotiating the transition role, and distress and identity loss when transition role identities were not maintained. In this stage I began to see these themes as being interrelated.

Variables are then integrated into theory during selective coding by combining and refining variables into themes (Strauss and Corbin: 1998: 103, 119, 123, 143). The overarching theoretical story involves identifying the core variable, that which is central to the explanation of the data as represented by interrelating variables. Here the researcher decides the “main [theoretical] story underlying the analysis” (LaRossa 2005: 850-851; Strauss and Corbin 1998).

Five primary and three secondary themes emerged from my analysis. These themes are discussed at length in the next three chapters, explaining how the grounded theory analysis developed an identity theory of boomer professionals in transition. A significant portion of the analysis involved working to comprehend how these themes interrelated. This understanding of how the themes related to one another as an overall process developed in an iterative inductive/deductive process during selective coding. This resulted in organizing and refining the themes to propose a theory of professional boomer transition within the context of identity theory. My theoretical argument is presented in the remaining chapters.

Grounded theory provided a procedure for abstracting detailed qualitative data, moving from indicators, to concepts, to variables, to themes, to a cohesive main theoretical story that



embodied the data. Coding for process occurred throughout, beginning during open-coding, but coming together during axial and selective coding when variables were interrelated. An important aspect of grounded theory, then, was that the objective was more than simply ascertaining a static representation of the data; it was to develop an understanding of the processes that enabled the generation of theory in the fluid and dynamic terms of the social world.

Grounded theory supported the research objective above and beyond providing a systematic approach to developing theory from qualitative data. Three other aspects of grounded theory were particularly relevant to my selection of these methods for my analysis. First, the emphasis on determining indicators and identifying them with concepts, the concept-indicator model, was well-suited to the importance that was placed on interpreting meanings that workers attach to aging, restructuring, themselves, and their work situation. Second, the importance of constant comparison in grounded theory undergirded the broader research objective of comparing different work situations. Comparison in open and axial coding assured that variables emerged that were useful when analyzing the differences and similarities between meanings held by workers in different work arrangements. Third, grounded theory stressed coding for process, which supported the research objective of examining the processes that occurred in the relationship between social structure, role identity, and career outcomes.

As I have outlined, I worked within the conceptual framework of identity theory. That is, I began with a preconceived notion of the direction that my theory building will take. As a result, my grounded theory analysis was both inductive and deductive. It was inductive in the sense that I endeavored to develop theory by generalizing observations garnered from in-depth interviews. It was deductive in the sense that I was strongly influenced by existing theory, which I used to

inform my research design. Identity theory affected decisions that I made during my analysis, which further informed the theory that resulted from my analysis.

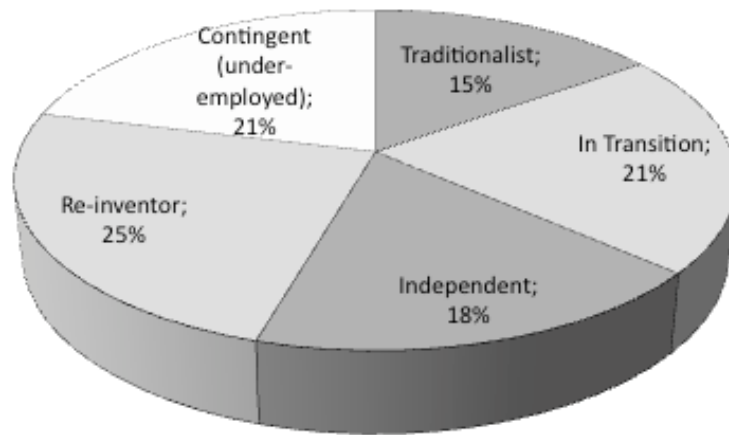
As an analyst I took several steps, either intentionally or unintentionally, that guided my analysis in the direction of identity theory. First, I developed an interview guide that framed questions about the meaning that individuals attach to certain aspects of their work. My questions were informed by identity theory because that is the theoretical foundation that guided the development of my research questions. Second, I probed on certain issues during the interviews that were likely to align with my interest in identity theory. Third, I made decisions during the analysis, such as which indicators were important, how the indicators represented concepts and how the concepts were categorized, what were the themes that emerged from these categories, and what was the main story that surfaced in my analysis. Each of these decisions, perhaps as conscious choices or perhaps as inadvertent judgments, likely was influenced by my knowledge and interest in identity theory. Working within the framework of identity theory likely had a substantive effect on my data collection and my grounded theory analysis.

LaRossa (2005: 853) acknowledges this epistemological duality of grounded theory, asserting that “In actuality, the methods rely upon induction *and* deduction.” By providing examples from his own research, he demonstrates the influence that the researcher has on grounded theory analysis that affect the results of the research. He references Strauss and Corbin’s (1998) acknowledgement that the relationship between induction and deduction is dialectical. My experience was that this dialectic was prominent as I proceeded with my research, and proved beneficial in applying grounded theory to my research on boomer professionals within the conceptual framework of identity theory.

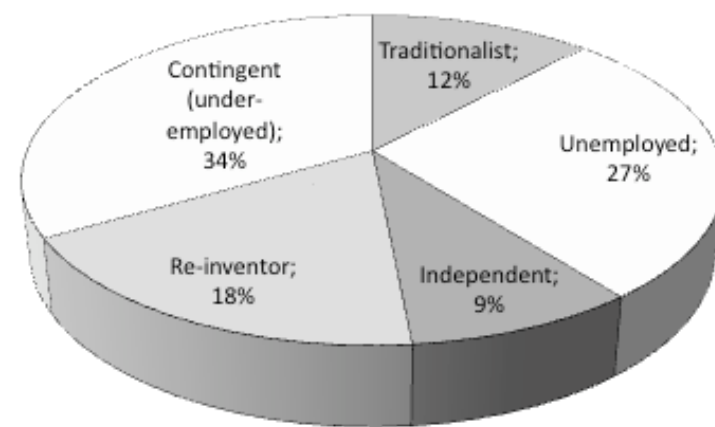
<b>Table 4.1. Sample Employment and Transition Status</b>		
<b>Employment Status</b>	<b>Quantity</b>	<b>Percentage</b>
Long-term Employed	5	15.2
Recently Employed	7	21.2
Underemployed	9	27.3
In School	1	3.3
Unemployed	11	33.3
<b>Transition Status</b>		
In Transition	20	60.6
Recently Out of Transition	7	21.2
Other	6	18.2

<b>Table 4.2. Sample Demographics</b>		
<b>Gender</b>	<b>Number</b>	<b>Percentage</b>
Male	20	60.6
Female	13	39.4
<b>Age</b>		
45-50	11	33.3
51-57	11	33.3
58-63	11	33.3
<b>Race</b>		
White	29	87.9
Black	4	12.1
<b>University Rank</b>		
Tier 1	13	39.4
Tier 2	11	33.3
Tier 3	4	12.1
Tier 4	5	15.2
<b>Highest Degree</b>		
PhD	1	3.3
Jurisprudence	1	3.3
MBA	10	30.3
Masters	5	15.2
Bachelors	15	45.5
Associates	1	3.3

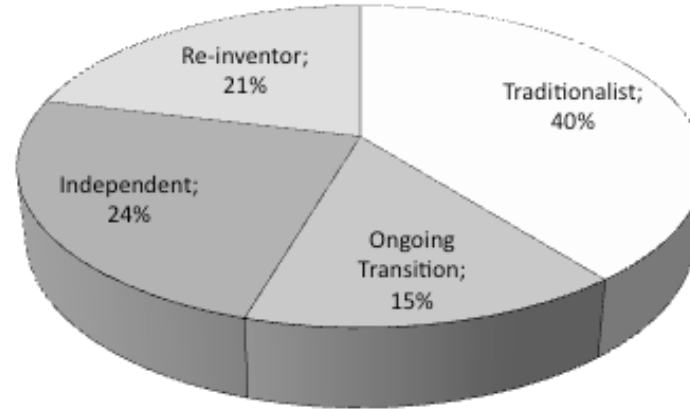
### RECRUITING



### POST-INTERVIEWS



### PROJECTED Extended Classification\*



**Figure 4.1. Sample Distribution**

## **CHAPTER 5 –ECONOMIC RESTRUCTURING MEANINGS**

Boomer professionals' careers held substantial meaning and they were more than willing to talk about their accomplishments and even their failures. The meanings that participants attached to economic restructuring provided insight into this significant source of structure that affects boomer professionals. My analysis of these meanings resulted in the emergence of key themes that explicate the structure influencing their worker role identities. Structure associated with the restructured economy seemed to be largely hegemonic, the product of a culture in which power is firmly rooted in the ideology of capitalism. The meanings expressed by participants indicate that boomer professionals place varying emphasis on different aspects of this ideology, but that they had largely accepted the tenets of economic restructuring. Further, social expectations had developed which served to impel these workers to actively negotiate the restructured economy and propagate intensified levels of economic restructuring.

### **Attaching Meaning to Economic Restructuring**

Participant responses to the effects of the economy and economic restructuring were surprisingly universal among the participants. The phrase "it is what it is" contains the most often stated words in the interviews. The restructured economy was viewed as something to be actively negotiated. It is part of the hand that has been dealt and must be played as best as possible. Individual workers could not affect it; therefore workers felt that they must learn to make their way within the constraints of the given economic circumstances.

Boomer professionals were quite aware of the current economy and changes in the economy over time. They generally were able to recall the economic conditions that existed during their periods of transition. Most related to the relative prosperity of the seventies and early eighties, the late eighties downturn, the dot.com bubble and the bubble burst, and the post-9/11

recession. All were aware of today's severe recession. When they talked about their careers they contextualized it in terms of these major economic periods.

These are particularly difficult times to be in transition (out of work, planning a business venture, reinventing a career). Nonetheless, the consensus was that "it is what it is." Transition was going to be tougher and require even more proactive approaches than might be the case otherwise. I noted very little resentment, although one participant placed blame on poor political leadership. I expected more bitterness because Wall Street greed, Bernie Madoff, and bank and auto bailouts were prominent headlines at the time of the interviews. Throughout the interviews there were indicators of the acceptance of capitalism, the risks of a free market economy, and the legitimacy of pursuing profits.

I was concerned that the poor economy at the time of the interviews would distract from thinking about longer-term economic impacts throughout the entire era of economic restructuring. Some concern was warranted; however boomer professionals seemed to be looking beyond today's economic circumstances. Tom Frost summarized the prevailing attitude of the participants as follows:

I am choosing not to be overwhelmed by the press...what everyone is saying about how tough the market is...I'm perhaps in sort of a waiting stage. I haven't gone full bore, send out thousands of resumes, call everybody and tell them I'm looking...who do they know? Put me in their network and that sort of thing. I've chosen to step back from it and say 'this too will pass...it always has-and just try to keep my wits about me.

For the most part participants were cognizant, at least conceptually, of and conversant on the effects of economic restructuring.

Earlier, I delineated four structural levels of economic restructuring. At the highest level, economic changes such as globalization increased competitive pressures. This resulted in institutional strategic responses involving broad strategies to address the higher levels of

competition (e.g., deregulation). Organizational tactics, such as downsizing were then implemented, which resulted in workplace changes such as the casualization of the employment relationship. Boomer professionals seemed to relate to each level of structure, but they tended to focus on only one phenomenon at each level.

At the highest levels, *economic changes and institutional strategic responses*, globalization had the most meaning. Underlying causes, such as increased Japanese competition or the rise of OPEC no longer held much meaning. Deregulation, technological advancements, and institutional investing did not hold much meaning for boomer professionals in terms of careers and transition. Globalization was viewed more in terms of what it represents today. The fact that the details did not hold much importance fit with the attitude that globalization is a reality that is well beyond the control of individual workers. The meanings that they attached to globalization and economic change in general entailed a general sense of the structure that is imposed and a deep sense that this structure is not a reason to fail to achieve their individual goals.

Very few comments suggested dissatisfaction with globalization. There were no statements decrying outsourcing and a loss of jobs overseas, no railing against NAFTA or other trade agreements. In general, the boomer professionals that I interviewed seemed to think in global terms, as global employees embedded in the global economy.

Downsizing was the most prominent feature of economic restructuring in the boomer professional perspective. Of the various *organizational tactics* that are used in the restructured economy, it certainly held the most significant meaning for most of the participants. I briefly discuss some of the other restructuring tactics used by organizations and then return to a detailed discussion of downsizing.

JIT/TQC and flexible work systems held virtually no meaning any longer relative to boomer professional careers. Some of the participants involved in process improvement remembered that these tactics are predecessors of Six Sigma and Lean Manufacturing, two process improvement programs that are currently in vogue. One participant mentioned Dr. W. Edwards Deming, who is the father of TQC, but, overall, other tactics currently held more meaning.

Among the other organizational tactics, mergers and acquisition had meaning when they affected a participant's career. Of the 33 participants, eight experienced 12 different instances of mergers and acquisitions. For the most part these mergers and acquisitions had negative consequences for those involved even though they generally were not hostile takeovers. Fran Kline contended that there was no such thing as mergers, just acquisitions because one culture always dominates. When another Big Six consulting firm merged with her company to create the Big Five, she recalled "how horrific that experience was, not just for me, but for people who I cared very deeply about." On the other hand, Wes Young, a 48 year-old technology executive "made a lot of money" twice when dot.com companies in which he played a major role were acquired.

Employment externalization held surprisingly little meaning, although some participants benefited from outsourcing when they independently provided services on a contract basis. Mike Noone, a 56 year-old sole proprietor of a company that contracted packaging services, indicated that, "as an independent contractor, there are a couple of things with the shift in the economy that bode well for me. People have streamlined their organizations to such a degree that they don't have competent people. There are lots of opportunities for people like me to be advisors to these stripped down organizations." In fact, Rod Steel, a 50 year-old veteran of the payment systems



industry, found that, when he managed a professional services department within a corporation, he encountered significant competition from ex-employees that were consulting in the same market. Vertically integrated companies, then, have experienced unintended consequences as a result of employment externalization.

Another organizational tactic with unintended consequences is reengineering. Generally, participants did not associate this with economic restructuring, but many had or were participating in reengineering activities. They used labels such as Process Improvement, Six Sigma, and Lean Manufacturing, but these were essentially reengineering activities. When I pointed out to these workers that they were participating in economic restructuring and potentially working toward job reductions as they developed more efficient work processes, they were nonplussed. They acknowledged my point, but did not see it as a paradox, continuing the theme of accepting the principles of restructuring. In fact, several participants suggested that they particularly enjoy reengineering activities.

Downsizing held the most meaning of the organizational tactics. Nearly every participant had personal experiences with downsizing and it was seen as the face of economic restructuring. Most participants viewed downsizing not as a change or a phenomenon that had increased in magnitude and frequency, but as a fact of everyday life in the workplace. There were no comments like “I wish there was less downsizing” or even “I wish I wasn’t downsized.” Comments were more along the lines of “I got caught up in a corporate restructuring” or “I was one of a thousand people who were downsized.” There are two dimensions to this perspective.

First is the general acceptance of downsizing, which adds to the theme of boomer professionals accepting actions that make companies more profitable or competitive. They strive to avoid being downsized, but realize that the possibility is omnipresent. Most try to be prepared

and expect to proactively manage the situation if and when it occurs. As Les Major, a 60 year-old telecomm veteran who has reinvented himself as a financial planner, noted, “I mean you can whine about it or you can live with it, and I choose just to live with it ok, and keep doin’ a good job.”

Nonetheless, those who were downsized were usually taken aback when it happened. Drew Frye, a 58 year-old unemployed marketing manager recalled his shock, “Well on one hand, ya know, I was, of course, for days and days confused about-it’s like, ok, didn’t anticipate this, what do I do now? So I didn’t know—for a month-about a month or so I didn’t know what I was doing, frankly. I had a sort of out of body experience.” David Driver recollected, “I mean I was in this—I was—it was surreal, I mean I was stunned.”

Part of the trauma that boomer professionals experience stemmed from the way that companies handled the process. They seem to put more emphasis on avoiding litigation and protecting their intellectual property than they do on compassion for the affected employee. Often the employee’s computer access is disconnected before they are informed that they have been downsized. Kirk Little, a 49 year-old geologist, remembered the experience as follows:

One day I went in and my computer didn’t work and I went to the secretary and said ‘hey, I can’t get into my account,’ and she looked real sad and then I went back and was doing some stuff and the guy I reported to—who owned the company—said ‘please follow us,’ and they had a lawyer on the conference call....I said that’s it, packed my box up and was gone within a half an hour.

Hans Stuart, a forty-nine year old senior sales and marketing executive in the tobacco industry, was stunned when it finally sunk in that he was losing his job. After all, only seven months previously, he had been told that he was in line for the top job in the company, Chief Executive Officer (CEO). Now he was being told that his services were no longer needed. Hans found out that he was being downsized via an errant email. Returning for a brief visit to the office between

business trips, he was checking his email when he came across a message from Human Resources advising him on his pension options upon “his imminent departure” from the company. Baffled by the email, his first inclination was to ignore it as an obvious mistake. But upon further reflection, he decided to ask his boss, the CEO, about the email. To Hans’s surprise, his boss was forced to reveal that the news was, in fact, correct, and that the CEO had been negligent in not informing Hans sooner.

The second dimension of the boomer professional perspective is the depersonalization of downsizing. Those who have been downsized are typically quick to point out that their being downsized was nothing personal. Identity theory, and self-esteem research in particular, suggests that individuals take measures to protect and enhance their sense of self (Reitzes and Mutran 1994; Rosenberg et al. 1995). Depersonalization of downsizing seems to be a means that downsized workers use to protect their self-esteem.

Vic White, a 59 year-old technology sales executive who is working on a solar energy start-up, offered this perspective:

...it was a great culture n’ company was doing well n’ ‘course it was impacted by the web stuff too and they had a series of five layoffs and even though I’d brought in forty or fifty million dollars into the company I was laid off because I wasn’t, you know, I wasn’t generating revenue on a daily basis, I was ancillary. I was an alliance guy so I took layoff.”

Les Major recalled his layoff as follows:

And basically what happened there was they had hired a more senior executive from the-out of the cable television industry and he’s looking around at who’s on his team and he sees this ex-telephone guy, so to speak, out running his primary call center (laugh). So I think it was-he was wanting to bring in one of his own or somebody who’d kinda grown up in the industry.

And Fran Kline summed up depersonalization of downsizing with her comments as follows:

...it was nothing against me personally, which honestly, was part of the issue for me, as-are you kidding, after twenty years I’m nothing more than just a number to you? But on

the other hand...it was easier to understand because I knew it wasn't anything personal, this was happening all the way up through partner level.

I examine the idea of depersonalization as it relates to identity more closely later. At this point, though, it is interesting to note that the only participants who did not depersonalize having been downsized were among those who seemed to be losing their sense of self and were experiencing very negative outcomes. Andy Berry's comments, for example, included "It was probably my fault that I was let go" and "I guess they were right that I didn't work hard enough." Andy had negligible prospects and seemed to be on the verge of depression. Depersonalizing downsizing seems to be an important aspect of a broader theme in which transition is proactively managed and emotional reactions are minimized.

Of the *workplace changes* involved in economic restructuring, casualization of the employment relationship was the most often referenced change as participants observed the transformation in the employer-employee relationship over the course of their careers. There was little bitterness over the changes, but more a wistful recollection of better times. Again, profitability and competitiveness were perceived as justifiable reasons for change. Virtually no one blamed companies for the changes, but most missed the security he or she had experienced earlier in their careers. Nearly all accepted that the situation was different and they either had adapted, or would adapt.<sup>9</sup>

Many of the participants' narratives did, however, reflect a general dissatisfaction with the impersonal approach that many corporations take to the employer-employee relationship. There seemed to be a line between casualizing the relationship in the pursuit of profits and dehumanizing employees that boomer professionals found unacceptable. As Vic White observed,

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<sup>9</sup> Only two participants objected to the workplace changes to the point that they vowed to no longer participate in a corporate environment. One became a reinventor and one withdrew from the workforce. The uniformity of the majority response seemed to have more analytical value, which I pursue further in the remainder of this chapter.

“You know, I talk to senior individuals who’ve been in the marketplace and they’ll say exactly the same as I do, is that, the market place has changed, that it’s cut-throat, you’re-as an employee you’re a commodity, you know, you’re a champion one day and laid off the next....” Offering a similar perspective, Phil Rich states that, “...the way companies deal with their employees and their people has degraded over the last 40 years. People used to be a lot more valuable to corporations and they are now quite disposable.”

Fran Kline indicated the anger that can surface when companies cross the line between managing their human resources profitably and treating them insensitively. She exclaims:

And the [talent matchers] said, “oh no we understand that you’ve done all that, but you know what we want-everyone has to fit into this box” and I said, “I don’t wanna fit into that box, I’m a circle, nope, not if you work here, you have to be a square.” And I said, “but I’ve been here twenty years, and I have made this company so much money and I have done all of this stuff, honest, loyal, dedicated. You can look through twenty years of personnel records, there’s not one smudge in my file, and I am doing good things for this company. Irrelevant, only boxes apply here.”

In spite of resentment that arose from being dehumanized, the more dominant theme was that boomer professionals strive to proactively negotiate the difficult conditions that economic restructuring has created. This attitude is reflected in most of the participant’s comments. Marie Pierce, a 57 year-old executive who has recently moved to the non-profit sector, noted, “the economy doesn’t create my ability to thrive, I create my ability to thrive.” Nick Prine, the 54 year-old owner of a packaging company, reflected, “That’s why we educated ourselves...so we could adjust.” Rod Steele suggested that, “No one promised me life was going to be easy all the time...” Perhaps the proactive attitude of boomer professionals is best reflected in Mike Noone’s recollection of how he related broad changes in the economy to his individual job:

I did see changes in the economy, and I did see changes in the organization, that, ah, were going to make it difficult for the organization to get value from my work; not...not, not see value in what I did, but actually get value out of what I did...and those changes had to do with the streamlining of purchasing. And the

fact that our value proposition as a company was to provide great service, and value-added service like design and testing and so forth and engineering...the areas that I was involved in, but the customers weren't willing to pay for that...when you put packaging up for bid those things don't get factored in. So, here I am, part of the organization, providing what appears to be a key part of the sale to the customer, but the customer's not buying that part. So, ah, I can't provide value if the customer won't buy that part of the value. So I went fishing, literally fishing for projects, internal projects where I could create value for the organization in the ways that I believed, with this changing economy, would help provide value, helping reduce costs and stay competitive.

Participant narratives alluded to meanings of varying salience related to economic restructuring, which I categorized according to the sentence associated with each of three classifications. One category involves meanings that function at a very low level of awareness, a second entails meanings that are passively accepted, and a third consists of meanings that are actively acted upon. Each category relates to structure that defines worker role identities in different ways, which in combination shape role occupants that are generally malleable to the needs of the restructured economy.

### ***False Consciousness***

The meanings that participants conveyed relative to all levels of economic restructuring conspicuously excluded the inequality imposed by economic restructuring. Generally missing from the narratives were accounts indicating that workers do not fare well in the restructured economy (Koeber 2002). Capelli et al. (1997: 206) note that "Employees seem to have borne a very large share of the costs of restructuring companies, and they are suffering for it."

Scholars have identified several ways that economic restructuring negatively impacts workers. Since 1967 unemployment levels have been trending upward while the duration of the average occurrence of unemployment has increased (Capelli et al. 1997). The proportion of workers experiencing periods of unemployment has increased (Medoff 1993) and there has been an overall decline in job tenure or the average time that an employee and employer spend

together since the mid-1970s (Swinerton and Wial 1995). The number of workers who are involuntarily employed on a contingent basis has increased dramatically since 1980 (Farber 1993; Mishel and Bernstein 1992). Since the early 1970s, real wages have been steadily declining (Capelli et al. 1997; Levy 1988) even though hours of work and workloads have increased (Shor 1992). Work-related stress has increased (Capelli et al. 1997; Fielden and Davidson 1999) while moral and attitudes have deteriorated. Lower job satisfaction has specifically been linked to changes in the employer-employee relationship (O'Reilly 1994). Capelli et al. (1997: 206) summarize “that employees are increasingly confronted with greater risk, often longer hours, increased work loads, and stress and are offered less by employers in return.”

Economic restructuring, by definition, involves change. At the highest level, it entails globalization's change in worldwide markets. Institutional strategic responses consisted of altered strategies to meet the challenge of global economic change. Corresponding organizational tactics developed that made downsizing, employment externalization, reengineering, deskilling, and contingent employment common practices, each of which changed the nature of careers. The effect was realized as workplace changes emerged to accommodate these new tactics. Not surprisingly, the balance of power between employers and employees also shifted (Osterman 1999).

Rubin and Smith (2001: 324) note, “Current conditions create widespread power inequities in employment relations. In particular, these conditions deepen workers' vulnerability to employers' preferences.” Economic restructuring involves efforts on the part of those who hold ownership in business, typically as stockholders and executives that are working to satisfy stockholders interests, to eliminate constraints on accumulation. Globalization, propelled initially

by Japanese competition and the rise of OPEC as a powerful economic factor, threatened capital accumulation among the U.S. power elite. Strategic and tactical responses by companies effectively increased the inequity with which profits accrue to the power elite by minimizing labor costs, eliminating constraints on profitability, and implementing new forms of worker exploitation. Power, and its associated benefits, disproportionately shifted toward business ownership and away from workers as a consequence of economic restructuring (Bowles and Gintis 1993; Danzinger and Gottschalk 1993; Harvey 1990).

In addition to increased economic inequality, quality of work-life decreased dramatically as a result of economic restructuring. Organizational tactics, such as downsizing, employment externalization, and mergers and acquisitions, disrupt careers, creating job insecurity and instability at work. Workplace changes, such as casualization of the employment relationship and the decline of internal labor markets, decrease the sense of belonging that workers derive from the workplace. Both extrinsic rewards, such as job security and income, and intrinsic rewards, such as fulfillment and loyalty, are diminished in the restructured economy.

Studies have shown that workers desire stability and predictability in their work (Halaby 1986; Jansen and Martin 1982; Schellenberg 2001), which, at best, is contradicted by economic restructuring. At worst, lives and entire communities have been shattered by the effects of economic restructuring (Dudley 1994; Milkman 1997; Newman 1998). The restructured economy does not operate in the best interests of individual workers. Objectively, workers, in general, are worse off as a result of economic restructuring. Boomer professionals, in particular, as workers typically rich in human capital, have been found to be especially vulnerable to employers and the restructured economy (Rubin and Smith 2001; Smith and Rubin 1997).



The boomer professionals I interviewed, however, did not convey dissatisfaction with the precepts or ramifications of economic restructuring. They did not attach meaning—at least they did not verbalize meaning—that indicated discontent with a lack of stability in their careers, diminished levels of job security, or compromised quality of work. Fundamental aspects of work that are predicted by sociological theory to be extremely important to workers were not a part of the conversation on economic restructuring. However, as Calhoun et al. (2002: 262) note, sociologists “should not accept people’s everyday accounts of their action as fully explaining it.” What participants did not say is quite significant. The pervasive silence on negative aspects of economic restructuring, while at the same time embracing ideals supporting profitability and competition, suggests that boomer professionals place more salience on the ideology of capitalism than they do on their individual need for stability, security, and quality of work. This primacy of ideology, the “beliefs, representations, discourses and practices which serve to legitimate and sustain existing social and power relations within a society,” over individual self-interests is a significant theme in my analysis (Abercrombie, Hill, and Turner 1990; Augoustinos 1999: 300).

Mannheim (1931) is credited with extending Marxist concepts to develop a theory of ideology. He wrote on the ability of the power elite, in this case those who affect the economy and have established the ideology of economic restructuring as an extension of the ideology of capitalism, to create hegemonic distortions of reality. He suggests that such distortions are not necessarily conscious or intentional. As Ritzer (2000: 354) notes, “Rather, distortions are more likely to occur simply because ideas emerge from specific sectors of the social world and are therefore *inherently* limited, one-sided, and *distorted*.” Nonetheless, hegemonic distortions resulting from power/resource dynamics do create illusions that can be likened to the concept of

false consciousness, an inappropriate state of satisfaction that arises from ideology that is not in the best interests of those affected (Seidman 1994). For example, in Marxian theory, the proletariat was conceived to be in a state of false consciousness prior to awakening to class consciousness and revolting against the bourgeoisie.

These unvoiced data, in conjunction with theory of ideological distortions, suggests a false consciousness, an ideological structure that limits workers' perceptions of the personal difficulties (alienating effects) imposed by economic restructuring. Based on the apparent acceptance of the restructured economy, the values upon which the restructured economy depends seem to have been maintained or solidified during the era of economic restructuring. These values include enthusiasm for work, perseverance, thrift, success, and opportunity (Bernstein 1997: 141). A key element of the structure that shapes worker role identities is a product of social expectations that boomer professionals take for granted and, perhaps, result from meanings of which they are not actively conscious.

Mannheim suggests that "The danger of false consciousness nowadays is not that it cannot grasp an absolute unchanging reality, but rather that it obstructs comprehension of a reality which is the outcome of constant reorganization of the mental processes which make up our worlds" (Calhoun et al. 2002: 297). Building on Mannheim's theory, though, false consciousness is not conceived as an individual cognitive limitation, but as a consequence of being embedded within a society that maintains and reproduces a capitalist ideology where "consciousness and discursive practices are primarily and largely determined by powerful cultural forces and preconceptions" (Augoustinos 1999: 303). I conceive of false consciousness as a distortion in the way that reality is reproduced, having been initiated by power-elites, but reified by those whose self-interests are not served by these social constructions. In social

psychological terms, false consciousness is a product of being a reflexive self in interaction with a capitalistic society (Falk and Miller 1998; Gergen 1994). Within an identity theory framework, distortions related to false consciousness develop from hierarchical structure that reinforces the dominant ideology at every level and results in worker role identities that are built on strong beliefs in a capitalist ideology.

### ***Passive Distortions***

Participants' belief in capitalist ideology is not completely unvoiced. The meanings attached to economic restructuring include conscious connections and general acceptance of two key thoughts that undergird changes in the restructured economy. First, most participants made statements that indicate a belief that the changes precipitated by economic restructuring are justified by profitability motives. For example, process improvement involving reengineering and deskilling, including the elimination of jobs, was viewed as necessary for the maintenance and growth of profits. Second, increased competition was viewed as valid rationale for companies taking more extreme actions than they might have otherwise taken in times of less competition. For example, treating workers as disposable through downsizing was considered justifiable in the presence of the heightened competition associated with the global economy. These two thoughts, which indicate an acceptance of economic restructuring ideology, are closely related. Profitability is required in a competitive environment and competing demands an emphasis on profits.

The acceptance of ideology associated with the restructured economy occurs at each level of economic restructuring. Participants' meanings can be summarized as follows: Globalization is simply the state of today's economy; deregulated (*laissez-faire* markets) are best; downsizing

is a necessary evil; and positive employee-employer relationships are an unfortunate victim of more competitive times.

These stated aspects of capitalistic ideology again seem to be contrary to the best interests of boomer professionals. Every participant had been personally affected by the consequences of companies responding to competitive pressure with steps to increase profitability. Nonetheless, the ideology seemed to be calmly accepted, suggesting that hegemonic distortions influenced participants' worldview and perceptions of self-interest.

Whereas I categorized the structure associated with meanings that did not surface in the interviews as indicating an acceptance of the ideology of capitalism, these verbalized meanings associated with profitability and competition seem to indicate an extension of capitalist ideology into the realm of economic restructuring. Although economic restructuring is a particularly aggressive implementation of capitalism, the underlying ideology was conveyed as passive acceptance. The structure that shapes worker role identities, then, also consists of an element of ideological structure that is passively embraced and consciously accepted as truth. This structure results in worker role identities that are built on the ideology of economic restructuring.

The verbalized awareness of profitability and competition may be the result of economic restructuring doctrine being more current than long accepted tenets of capitalistic ideology.

However, within an identity theory framework, I suggest that it relates to an inability to change the situation. When individuals are involved in interactions where their self meanings, that is their identity standard, are incongruous with their behavior in the situation, they attempt to either change the situation or their behavior. In this case, the situation, economic restructuring, is far too entrenched to change, particularly from an individualistic standpoint. Rather, the only option available to a worker in the restructured economy is to change their behavior. One way that

boomer professionals seem to have changed their behavior is to have accepted profitability and competition as justification for almost any action that companies take in the era of economic restructuring. This thinking brings behavior more in line with the situation and, over time, alters identity standards to be in closer accordance with economic restructuring ideology. Thus, a distortion of self-meanings develops that is indicated by passively voiced acquiescence to profitability and competition as not only dominant, but also valid and perhaps even natural, ideology.

### ***Adaptive Distortions***

In addition to meanings that are suggestive of false consciousness and those who reflect passive acceptance, five other themes emerged associated with more actively embraced, actionable meanings. These meanings relate to the ways that boomer professionals navigate the restructured economy. This type of structure involves ways in which workers have adapted to the changing nature of work in the restructured economy and these active responses have become part of worker role expectations. These actions, adaptive distortions, are not necessarily in the best interest of workers, as discussed above, and may also be a source of role conflict and role strain. However, these actions also may alleviate distress by leading to employment. Options in which to earn a living are virtually nonexistent outside of the capitalist economy. Further, within U.S. culture, legitimate pursuits which provide self-enhancement, such as increasing self-esteem, are limited outside of the work arena. Workers are constrained in the fields (see Bourdieu 1980) in which they can maintain their sense of self. Further, given the cultural centrality of income and wealth, choices are generally limited to striving to succeed in the workplace. As a result, adaptive distortions also serve to propagate economic restructuring because workers develop

ways to achieve in the restructured economy. The five themes are discussed in the following sections.

### Early Career Success

Early career success is a remnant of early economic restructuring that has instituted a strong success ethic. Having achieved success relatively easily early in their careers, boomer professionals have personally experienced the success that is a key part of the capitalist ideology. Success has been made more elusive by economic restructuring, but the restructured economy does not function unless workers are actively engaged in pursuing success. Early career success not only serves to set the bar based on a time when there was a broader demand for boomer professionals, it also serves to sustain economic restructuring ideology—in times when the supply of educated workers outpaces demand and success is more difficult to obtain—by having created a workforce that believes in their ability to succeed.

Generally positive career trajectories usually lasted at least ten years into their careers, and often much longer. Professionals who entered the workforce during the typical years for boomers—1968 to 1986—generally did so in good economic times. For the most part, they were in demand when they graduated college, particularly in technical and business fields where demand outpaced the supply of educated workers. There was a shortage of engineers and computer scientists, for example, during these years as technology experienced rapid growth. Similarly, workers with MBAs and financial experts were highly sought after as the economy expanded and restructured due to globalization. Virtually every field in which corporations hired college graduates—workers generally considered to be professionals—were in areas where jobs were plentiful (Bound and Johnson 1992; Cortada 1998; Zuboff 1988). Boomer professionals generally entered the workforce with considerable opportunity available to them.

Once in the workforce, boomer professionals typically encountered a corporate world that encouraged career growth. Within companies, internal labor markets assured that capable workers would have a career path without having to leave the firm. Many workers could, and did, experience long and prosperous careers within a single company. Ed Hardy recalled his long-term career with a Fortune 50 computer company as follows:

It was a great career! I can't believe 25 years went by so quickly, but it was because I was doing something new and different every 18 to 36 months. It was always fresh, it was always a new challenge...it was phenomenal! And the culture...was one where they developed you and they prepared you for every position. And they worked with you on an individual development plan where you had a *career* path. So they *built* a career path for you!

Many companies had training programs to accelerate their employees' progress into management. Les Major experienced this type of training with a major telecomm company. He recalled, "I was hired into a initial management development program, you know, we would call 'em 90 day wonders at the time because we'd go through the 90 day training period and then we would be assigned our first group of employees to manage."

However, boomer professionals were not restricted to one company. They were willing to move to other firms for promotional opportunities if they were not promoted quickly by their current company. My analysis showed that they experienced substantial mobility within their chosen industry, but that few, primarily higher level executives, made dramatic shifts from one industry to another. Mobility within an industry may relate to the fact that competition, both globally and domestically, was increasing. Opportunities within an industry were often opportunities with competitors and part of competing is the rivalry for human resources. Mobility within industry boundaries also makes sense when an industry is viewed as interrelated suppliers and producers. A supplying company often is interested in employees of companies that they sell to in order to gain insight into their purchasing decisions, culture, and needs in

general. Similarly, purchasing companies may need specific expertise on material or services that suppliers provide and have an interest in the supplier's employees as a result. Therefore, another intra-industry path for career growth—one that surfaced in several career narratives—was between suppliers and producers.

Whether internal to a company or to an industry, promotional opportunities and career growth were common for most boomer professionals during their early career. For older boomers this period of expansion, which in many sectors lasted until the dot.com bubble burst in March 2000, career growth may have continued over 30 years. Even for the youngest boomers, the period of opportunity often lasted a decade.

Phil Rich's early career demonstrated the mobility that boomer professionals experienced. He graduated from a respected technical school with a Master's degree in electrical engineering and was immediately offered a job with a Fortune 50 household and personal goods company with excellent brand recognition. After a ten-year career, in which he experienced increasing technological responsibility, he left for an opportunity in engineering management with a Fortune 100 food consumer products company. Five years later he joined another Fortune 100 food consumer products company where he directed industrial automation for the entire company. When he lost his job in a massive corporate restructuring, he was quickly hired by a supplier to the food company that had just downsized him. He stayed with the supplier until he was forty-five, ending a 21-year span of upward intra-industry career mobility.

Marie Pierce entered the market with an interest in technology and computers when opportunities were rampant in 1973. Combined with her math degree with an emphasis on operations research, she easily found work with one of the BUNCH producers of mainframes.<sup>10</sup>

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<sup>10</sup> Mainframe computer manufactures were often referred to as the BUNCH in the 1970s. The BUNCH consisted of Burroughs, UNIVAC, NCR, Control Data Corporation, and Honeywell.



She moved to warehouse automation with a fast food division of a Fortune 50 company, then provided technical services with a bank at the time that ATM and bank cards were first being brought to market. By the time she was thirty; she had earned a VP title and moved to New York City to work for a top banking consultant that ultimately joined forces with one of the Big 4. Rather than specific industry knowledge, she was able to leverage a combination of technical and business skills into an upwardly mobile, somewhat atypical, inter-industry career.

Companies developed programs to create career paths for their employees, in part, to encourage loyalty. Long-term employees who knew the firm's business and culture were valued early in the boomer professionals' careers (and more correctly, early in the era of economic restructuring). This employer-employee relationship changed dramatically over the course of economic restructuring, but a theme of early career success became a significant part of the boomer professional experience.

Boomer professionals developed a history of success because the structure developed, or was established, for them to be successful. They learned to expect favorable outcomes. They developed positive self-concepts that influenced their future work roles—lingering identities—based on their accomplishments. They felt good about themselves and developed a sense of self-esteem as a result. Significant others in their social networks learned to expect boomer professionals to be upwardly mobile. They were not prepared to fail. The processes that form social expectations, and create structure, for boomer professionals in the restructured economy remain heavily influenced by these early career accomplishments.

#### Efficacy and Proactive Behavior

The boomer cohort lived through the social movements of the 1960's. Civil-rights, women's rights, and the sexual revolution occurred during their younger, formative years.

Boomers felt that they had an impact on the world around them. In fact they did. They played an important part in ending the Vietnam War. They became accustomed to a sense of efficacy or being in control of their world (Croker 2007; Freedman 1999). Combined with their early career success, boomer professionals came to feel in control of their career and self-efficacious in achieving positive outcomes.

As part of feeling self-efficacious, which includes a sense that one's actions have an effect, boomer professionals are an action-oriented group. They do not accept things as they are, but instead have a deep-rooted sense that they can make a difference in their lives. They try to take action and they believe that their behavior can alter the situations that they encounter. As a result they behave proactively. It is beyond the scope of my study to determine whether this attribute distinguishes boomer professionals from other groups of workers. I assert only that a significant characteristic of boomer professionals is their proactive behavior.

Ed Hardy was interested in transitioning from engineering work to sales of large systems within his Fortune 50 computer company. He was black and, at the time, blacks did not have customer-facing sales jobs in large systems. They were relegated to sales support or other areas of the company. Ed was determined to change this unwritten rule and to pursue the career path that most interested him. He forced the issue and obtained approval to move into large system sales in exchange for successfully completing a technical project. When the technical project was finished, his manager reneged on the agreement, but Ed took it higher in the organization, going as far as resigning at one point. In the end, he became the first black to work in large system sales where he became quite accomplished and leveraged his sales achievements into a long, upwardly mobile career with the company.

Earl Birch, a 47 year-old technology professional, also wanted to change career paths from the technical aspects of computer software to sales. He had spent some time in Europe working on technical issues and, while he was there, got to know many of the international value-added resellers (VARs) and distributors. When he returned to the states he begged for an opportunity in sales and was finally given a chance with the indirect sales channel in Europe, an area that had historically underachieved. He was able to turn the channel around by personally visiting each reseller and participating with them on sales calls. Recently married, he nonetheless spent weeks-on-end abroad to demonstrate his sales ability and develop an ongoing career in sales.

Boomer professionals are expected to think efficaciously and to be proactive. Others expect them to behave this way and they expect it of themselves. It has become a form of social structure that affects how boomer professionals should be, influencing their mentality and their actions. How they behave in the restructured economy is, in part, dictated by this important structural effect.

### Work Motivations

Each participant placed a high level of importance on work. No one suggested that work was not a significant part of their life (also see Gamst 1995). Certainly there was variation in participants' commitment to the worker role and some had stronger work motivations than others. However, neither of these dimensions seemed to be explanatory with respect to identity or outcomes. The pertinent observation seemed to be that all participants had adopted significant work motivations that resulted in work being particularly relevant in their lives and that fact did relate to identity and outcomes. This consensus on the relevance of work for the participants implies that boomer professionals view work as a particularly salient role. The characteristics of

work that give work meaning vary from participant to participant, however three themes emerged in my analysis.

The most often stated work motivation is to gain a sense of contributing, a feeling of worth, of making a difference. While far from universal, there is a strong sense of work as a responsibility. Many have a responsibility to contribute and many feel a responsibility to work hard and to put in long hours. Thus, the first theme is the centrality of a strong work ethic for boomer professionals.

The second theme involves working for a sense of fulfillment. Boomer professionals think work should be interesting, challenging, stimulating, fascinating, etc. For most, work is not just about contributing, it about receiving a cerebral benefit in return.

The third theme is that, beyond responsibility and fulfillment, the motivations for working are as varied as the participants. Everyone seems to want something different from their work. The list is endless, but includes seeing a design implemented, being on the leading edge of technology, growing a start-up business, and doing things that other people are afraid to do.

Work holds great meaning, but the form that the meaning takes is quite diverse.

The need to contribute, the desire for fulfillment, and the relevance of work independent of the reason for work suggest structural patterns that strongly influence boomer professionals.

### Individuality

Western culture has been shown to embrace the individual. Individuality is recognized as one of the most important values in U.S. culture. It is a fundamental aspect of the way that we think (Nisbett 2003). Boomer professionals are embedded in this culture and perhaps take individuality to a slightly higher level than other cohorts in the workforce. It may stem in part from having led prosperous lives; however, the phenomenon seems to also be influenced by

economic restructuring. A major lesson that has been learned by boomer professionals over the course of their careers is that they are increasingly individually responsible for their careers (Cappelli 1997; Cornfield et al. 2001; Osterman 1999).

Companies increasingly treat employees as though they are disposable. Individual workers must manage their own career, participating in networking and developing contacts rather than negotiating much simpler internal labor markets. They often are at least partially responsible for their benefits, choosing between a complex set of trade-offs and risking increasing amounts of their own money on their choices. And, responsibility for funding their retirement began to shift to the individual employee with the advent of the 401k where once retirement pensions were a fairly standard benefit for long-term professional employees. They must be prepared to fend for themselves when downsizing occurs. There has been a clear shift away from employer responsibility and toward individual responsibility for careers and benefits (Cappelli 1997; Cornfield et al. 2001; Osterman 1999). Although individuality was ingrained in the culture of their youth, individuality is a lesson that boomer professionals have had to apply in order to survive in the workplace.

Tina West, a 54 year-old veteran of the advertising business, contemplated her chances of being successful with her technology start-up venture. She reflected, “I do [believe that we’re going to be successful]. I just don’t know how long it will take. I do, because I feel like...I know that it’s a good idea and I know that...I’m the right person to do this. I know I am. Why? Because everything I’ve done prepares me. I have all this experience. I need to do something with it!”

Phil Rich demonstrated both aspects of individuality when, out of work, he realized that he would have a better chance of his resume getting in front of a decision-maker if he had a Six

Sigma certification. Courses that offered this certification were available, but cost several thousand dollars; much more than he wanted to pay being out of work. He was in outplacement and figured that others in outplacement would have that same issue. He found an unemployed professor who was familiar with the material, split the cost with several other associates from outplacement, and obtained the certification at a fraction of the cost he would have incurred otherwise. He took sole responsibility for finding a solution, taking care of his own needs in a way that prioritized getting what he wanted.

Mike Noone took charge of his career when he realized that he was no longer having a significant impact on his companies business. “One of the things that I mused about was that this chunk of money would show up in my bank account twice a month and it really didn’t matter what I did,” he noted. At age 54 he decided that after being with one company for 28 years he either needed to make a change or resign himself to “riding it out” for another 11 years. He stated that, “I felt I had achieved the level in the organization that I was going to be allowed to go. So I decided that I needed to make a change. The way the organization was operating, it really wouldn’t make a whole lot of difference...for me, at that point. So, I recognized that going out on my own, I wasn’t going to make a living unless I was focused on making a living.”

As a structural effect, then, I consider two dimensions of individuality among boomer professionals. First, is an extension of individuality as exemplified by U.S. culture. Second, is the sense that boomer professionals must take individual responsibility for themselves. Both are structural patterns that affect how boomers respond in the restructured economy.

### Authenticity

Many participants expressed a desire to be more “true to themselves” in their choice of work. They seem to want their work to have more meaning that is compatible with their ideals.

This need seems to increase with age, although boomer professionals have expressed a strong sense of right and wrong throughout their career. Of the five adaptive distortion themes associated with the restructured economy, the authenticity theme is the only one that seems to operate in opposition to the ideals of economic restructuring. As such, seeking authenticity may be one way that boomer professionals strive to adapt the situation, an unfeeling instrumental-rationally restructured workplace, to be more congruous with their own self-meanings. In any case, authenticity appears to be a significant structural force that influences boomer professionals' worker role identities.

Ben Clark resigned when he was asked to substitute a less expensive flame retardant that didn't meet quality standards, which he thought was unethical. Tina West resigned from an advertising firm when she thought the company was making poor decisions because of an "MBA mentality," a focus on profits at the expense of high quality, creative services. Brian Woods lost interest in working in an environment that treated workers insensitively and decisions were made solely on short-term profits.

Authenticity, however, is more than ethics and ideals. It involves a sense that one's work has meaning that matches their sense of self. Beth Huff, a 48 year-old former marketing executive with a successful marketing career with two different Fortune 100 companies in food consumer products and beverages, climbed the corporate ladder and had full P&L responsibility as a VP and General Manager. At the age of 35 she took up watercolor painting. By the time she was 43 she quit her corporate job and made art her new career. She told the story of her decision as follows:

You know, if my life's about beauty, love, and inspiration how-the biggest chunk of my time has nothing to do with that and I even tried to bring in the inspiration-say, well I could inspire my employee's and all that and just in the environment that I was in was just so chaotic and so-it almost seemed like, pointless, it's like,

well we'd have these meetings for 12 hours and nothing would happen as a result and now we're gonna talk about this again the next day, and is any of this making any difference? So, it almost-it got, probably to the point where I thought to myself, you know, like God put you here for some other reason other than to make money.

And you have to go through a lot of, believe me, a lot of mental gymnastics to be willing to give that up, and say, ok well, I'm gonna go to-do something where I don't know if I'll make any money or what is it gonna look like and-but I put-actually put together a plan, it was like a 2 year plan, I said, what were the things that I would need to have in place in order to make this happen. So I had some milestones around financial goals, like I wanted to pay off my mortgage so I wouldn't have-I could lower my overhead, that kind of thing.

And then I had milestones around the painting too, that I would be getting into shows and I'd be startin' to sell my work and stuff, just so I felt like I had confidence that I could actually pull it off. And, you know, then I kinda got to the point where it's ok-what's the worst that happens if this doesn't work out? I could always get a job somewhere, you know, I had a degree, I have marketable skills, I'm not gonna be starving if I, you know, had to go work at Target, I mean like you get to the point of just trying to overcome your own fears about making such a big change.

So now I really feel good about it. I think a lot of my choices were around being true to myself in terms of my vision, my purpose for my life, and how do I wanna spend my life? Having a better quality of life, having more time with my husband, having more flexibility. I just wanted to have more independence and more control of my own schedule and life and time....

Marie Pierce had a unique perspective on authenticity in her work. She viewed the workplace as an arena that helps her to learn about herself. Work had always been at the center of her life and identity. When she experienced marital problems, ultimately ending in divorce, her work had an almost cathartic effect. She held senior positions in a healthcare company and an insurance company and was leading a technology start-up during the dot.com era. When she was out of work during the economic downturns associated with the dot.com bubble burst and 9/11, she searched for a deeper sense, or knowledge, of her self. She earned a Master's of Divinity degree. She considered entering the "business of spirituality," but realized that the structure and organization that she had experienced in the technology business was extremely important to her. She reinvented herself as a person and used her job to find authenticity through



her work. She was currently the CEO of a non-profit that provides technology assistance to other non-profits. In her words:

The real reason why I'm at [my current company] is that it allows me to come back into a world that seems like it has a lot of structure and organization in the business world and the technology world, which is a very mindful world and when I left that world I was one person...I'm very different now, but when I came in I had the same habits that I had before that I didn't know that I had before and [my job] is allowing me bring all those aspects of me as I am now and I'm learning now and reinvent all of that in myself and understand it seeing the workplace as being a place of learning of myself.

Beth and Marie's narratives are two of the more noteworthy examples, but the search for authenticity emerges from several other accounts as well. It is pervasive enough that I consider authenticity, the search for meaning and purpose in work, to be a structural effect. It may represent a return to the values of the social activism of their youth or simply be an extension of a broader search for meaning in life that increases with age. Participants who seek authenticity did so within the boundaries of capitalism. For example, Beth Huff reinvented herself as an artist following a career as a marketing executive and she operates her art venture as a business. Brian Woods reinvented himself as an academic following a business career, but did so in a discipline that was marketable within the workplace. In this sense, the search for authenticity does not seem to represent a significant resistance to capitalist ideology, but more a way of making the dominant ideology more palatable. As a result, I consider authenticity to be another form of adaptive distortion, one that seems to be a trend that is becoming more structurally entrenched among boomer professionals (Bridges 1979; George 1998).

### **Career –Track Effects**

The structural effects discussed thus far are associated with the ideology of economic restructuring. However, another structural pattern that emerged from my analysis involved effects that varied according to different career tracks. I conclude that there are three career-

tracks that are notable in how they differ structurally and how they impact boomer professionals in transition. I've categorized these three career-tracks as (1) CXO's, (2) middle-management, and (3) individual contributors.

### ***CXOs***

CXOs, consist of workers whose careers have progressed to senior-level, C-level management. Typically officers of their company, they have attained positions such as Chief Financial Officer, Chief Operations Officer, Chief Technology Officer, President, or Chief Executive Officer. This group is the least structurally constrained of the three groups, especially when it comes to career mobility. Their skills are viewed as transferable within the corporate world, allowing them to move from one company to another or one industry to another with relative ease. Age also seems to be less of a negative factor for this group. They experience less age discrimination on the job and in the hiring process. The corporate youth culture does not seem to extend to the CXO ranks. Rod Steele observes, "They'll put a CTO in a job at 40, but if you look behind that...the next level down, they're not 40. But the CTO is there to develop products or run the technology side of the business. The CTO's looking to become CEO...soon. So those C-level positions are a different category of positions. That's the way I see it." However, they are not exempt from structural limitations—having fewer positions available as job opportunities, particularly in an economic downturn, for example—but are less constrained overall than the other two groups.

### ***Middle-Management***

Middle-management is comprised of the large group of boomer professionals that have advanced from their educational specialties (e.g., chemist) to more generalist, or business-oriented positions. Typically they manage other people. MBAs are common in this career-track.

Their general business skills provide them with some mobility as their skills are viewed as transferable beyond one company, but they are often constrained within the boundaries of a particular industry or management skill-set. Within the corporate world, they are seen to offer knowledge of an industry combined with general management abilities. After years of corporations eliminating levels of management, supply is higher than demand for this level of professional. In today's downsized workforce, companies do not have to search outside of their industry to find workers to hire from this category. Thus, they are more structurally constrained than CXOs.

Age is also a more significant factor for middle-management. They may be viewed as less malleable than younger workers because they are steeped in practices tied to specific industry or company cultures. Older workers in this group are stereotyped as being more change resistant than their younger counterparts. Because they have been out of college longer than younger workers, they are viewed as being further removed from the latest management trends. Further, experience is often considered a negative by hiring managers who may not want to hire someone who will compete with him or her for future promotions. Also, their experience comes at a price because they generally have higher salaries than younger employees due to their tenure (Budros 1997; Nelson 2002; Sicker 2002). As far as career-track structure this group represents a middle ground among the three groups.

### ***Individual Contributors***

Individual contributors consist of workers who have remained very closely tied to their educational specialties. They are engineers who continue to provide primarily technical contributions. They are financial personnel whose main contributions are as accountants or planning and analysis specialists. Workers in this category may manage small groups, but they

also have responsibility for technical, financial, or other specialty contributions of their own.

David Driver provides some perspective, noting “You know one of the reasons I went to business school was because I saw a lot of 45 year old engineers getting laid off in my engineering companies - and the reason was because they became expensive, there was no place for them in management, they were out of touch with the latest technology, you know, so they sort of worked themselves out of a job.”

Individual contributors have the least mobility. They may have transferrable skills, but this is often overshadowed by the perception that their skills are outdated. Engineers and computer scientists are particularly vulnerable to the notion that the relevance of their skills decreases with the amount of time since they graduated from college. When considered along with the fact that their salaries generally increase with time out of school, older individual contributors are often considered by companies to be a poor value. Individual contributors also carry the stigma of company culture. For example a long-term engineer with IBM is viewed much differently than an engineer who has worked for a successful start-up. Generally, having spent significant time in a specific company culture is viewed negatively by hiring managers.

Individual contributors often have industry boundaries that limit their mobility as well. Andy Berry, for example, had a long career as a power engineer with a major utility in the southeast. When he was downsized he faced an industry that relied on fewer engineers than it had previously. His skills were not transferrable to other industries and his extensive experience with one company was not of marketable value within the industry. Only small regional power companies showed interest in his abilities. He took one of these jobs in southern Georgia, but soon found himself limited in his attempts to fit his big company experience into the small company culture of his new firm. He was let go after eighteen months. Further attempts to work

within the industry that he knows best have resulted in a few jobs, but these have all been short-term. If he has remaining options to contribute his knowledge and experience, they are not currently clear to him.

Overall, individual contributors have the least ability to recover from being downsized. They have less mobility between companies and industries. They are applying for positions where the corporate youth culture is the most entrenched. And downsizing over time has created an oversupply of individual contributors. They face more structural constraints than the other two groups of boomer professionals.

## **Summary**

In this chapter I examined the meaning that social structure related to economic restructuring held for boomer professionals. Not surprisingly, much of the relevant structure is the product of ideology that defines the U.S. and global capitalist economic systems. I examined the meanings as distortions within ideology theory in the sense that the meanings attached to aging and economic restructuring often include distortions between ideological beliefs and values that would best represent individual's self interest (Mannheim 1931; Ritzer 2000). I identified three types of hegemonic structure: false consciousness, passive distortions, and adaptive distortions.

False consciousness ingrains workers with the ideals of capitalism and its work ethic, passive distortions entrench the ideals of economic restructuring, and adaptive distortions serve to create workers who are willing participants in the restructured economy. While false consciousness and passive distortions are important structural components that contribute to the formation of worker roles that align with U.S. hegemony, adaptive distortions offer particular

insight into boomer professional role identities. I have described five adaptive distortion themes in this chapter.

Early career success is adaptive in the sense that a success ethic is constructed that sets worker expectations for achievement in the restructured economy. Early career success is a distortion because sustaining progressive success in the era of economic restructuring is difficult, if not futile, for an increasing number of workers. Because boomer professionals entered the workforce under conditions which facilitated advancement of their careers, it is likely that early career success is a particularly influential for this group of workers.

Proactive behavior and work motivations are adaptive because this type of action aids the negotiation of the restructured economy. Both themes entail a distortion in the sense that growing numbers of workers expend increasing effort in the pursuit of decreasing rewards. Boomer professionals, the largest and fastest growing segment of the labor force, are especially influential in setting expectations for proactive behavior and work motivations. Further, they may be more steeped in the capitalist work ethic than younger groups of workers due to their proximity in time to the Great Depression and the impact that the depression had for their parents and grandparents.

Individuality often involves creative approaches to surviving, or even flourishing, in the restructured economy and, as such, is adaptive. It is a distortion in the sense that creativity and individual effort are expended for diminishing returns. Individuality, as an attribute and a value, is generally considered characteristic of boomers. Whether boomer professionals are unique in this regard is debatable, but anecdotal evidence suggests that they may be. They certainly have a history of affecting their individual and broader social outcomes.

Authenticity differs from the other adaptive distortion themes because, unlike the other themes, it does not align perfectly with the ideals of economic restructuring. Nonetheless, authenticity is adaptive as a means of coping with or responding to the changing work environment. Workers in search of authenticity often remain active participants in the labor market. It is a distortion because authenticity is not widely attainable in today's primary labor market for most workers. However, increasing numbers are finding work that provides a sense of authenticity, often in secondary labor markets, and therefore tends to attenuate the instrumental nature of laissez-faire capitalism. Because the desire for authenticity has been related to aging (Bass 2000; Biggs 2004; Moen 2003; Weiss and Bass 2002) and boomer professionals are an aging group, authenticity as a theme may be particularly emblematic of this group of workers. Not only are they in the cited age group, they often have the human capital to pursue their desire for authenticity.

All of the structure indicated by the meanings conveyed by participants, as well as meanings that went unstated, contribute to the formation of worker role identities. Worker roles are likely to be characterized by values that match the ideals of capitalism and economic restructuring. I address aging meanings next, and then consider how structure associated with economic restructuring and aging influences the formation of work related role identities.

## **CHAPTER 6 – AGING MEANINGS**

Age held significant meaning for boomer professionals independently of the implications of aging at work. However, it is the intersection of aging along with economic restructuring, the ways that these two categories of structure affect older workers, that is the focus of this study. Having examined forms of structure associated with economic restructuring that influences the development of worker role identities in the previous chapter, I now investigate the relationship between structure and worker role identities that correspond with aging.

### **Attaching Meaning to Aging**

Participants in this study addressed aging directly. No one hesitated when I asked how old he or she is. Their straightforward responses seem to come with an unstated qualification that they do not view themselves as being as old as their stated number would indicate. Many suggest that they do not look as old as they actually are. If aging is the enemy, they think they are winning the battle. Age identity for boomer professionals is much younger than their chronological age (Riley, Foner, and Waring 1988; Kaufman and Elder 2002; Logan, Ward, and Spitze 1992). Every indication is that their age is an achievement. They have grown through their experiences. They have as much, or more, to offer as anyone in the workforce.

Nora Reese, a 50 year-old finance executive who is currently searching for a job, exemplifies this attitude when asked about her age. She declared, “No big deal. First of all I don’t look - I don’t look like I’m 50. I don’t try to hide it; I put it on my resume. I look at it as a badge of honor. Not an issue.”

Ed Hardy, a 62 year-old executive who has reinvented his career more than once, is currently interested in working with start-ups. He exuded a high level of energy, but at this stage of his life does not wish to put in the endless hours demanded by a new business venture.



Instead, he finds opportunities to consult with younger entrepreneurs, leveraging his experience and his contacts to provide value to start-ups. He noted, “I’m still energetic, I’m healthy, I feel great...I think as young as these young people doing this [start-up]. So, I’m younger than my chronological age!”

For boomer professionals there does not seem to be a sense of decline due to their age. There was some variation in health as some participants were dealing with manageable conditions. One participant was a cancer survivor, but was in good health at the time of the interview. Another had significant chronic diseases to deal with, but discussed at length how she was able to manage her work and health on a daily basis. She noted how helpful coworkers were in their awareness of her diabetes and their assistance in making sure she ate properly. Only one participant suggested that health played an issue in his entry into transition, noting that he had unresolved health issues at the time that have since been diagnosed and were currently under control. Generally health was not cited as a reason for any limitations.

Further, participants were typically unwilling to admit to age as a contributor to their being less effective workers. Some noted that they had become less willing to work long hours or to travel as much as they grew older. This tendency, however, seemed to be more related to maintaining a sense of balance in their lives as opposed to a decline associated with aging. I expected that some participants would feel that they substituted experience for youthful energy, but this line of thought was not a part of the narratives. Instead, participants seemed to feel that they could compete on a level playing field with workers from other age groups.

However, each participant was well aware of ageism in the workplace. Most recognized the youth culture becoming increasingly entrenched within corporations. When pressed, nearly every participant could think of circumstances in which they believed he or she was

discriminated against based on age. No one dwelled on these accounts and many conceded that age discrimination is virtually impossible to prove. The consensus seemed to be that ageism is a reality in the workplace that cannot be easily identified, much less eliminated. There was a universal conviction—although it varied in strength—that ageism was a reality that must be dealt with. The variation in the strength of this conviction ranged from a participant who pursued legal action due to age discrimination to those who shrugged ageism off as an unfortunate fact of life. However, I was not able to relate this variation to other meaningful variables or the larger theoretical story that emerged from my analysis.

Perceived reasons for ageism most often had to do with being experienced. Both employed and unemployed boomer professionals encountered the effects of experience. Two themes, related to being experienced, surfaced from participants regarding boomer professionals who have a job. First, older workers who are employed are generally compensated based on their experience and tenure; therefore they earn more than their younger associates. As a result, they are more attractive targets for downsizing because eliminating their salary has a disproportionate impact on the cost savings associated with a reduction in force (Budros 1997). Second, employed older workers are often considered by their employer to be a “known quantity” that have achieved their maximum potential. Rather than viewing this as a positive attribute in that an employer knows what they can count on, companies are perceived as thinking of these workers as having peaked. They are thought to have reached their career potential and a company, focused on growth, might retain a younger employee with potential over the older employee who is considered a known quantity and thought to have limited upside.

Four experience themes arose from participants regarding boomer professionals who are out of work. First, experienced workers are perceived as a bigger threat to hiring managers than

their younger counterparts. Particularly if the hiring manager is less experienced, they may be reluctant to hire someone with more experience and may chose to avoid setting up a competitive or challenging situation. Second, older workers are often perceived as being embedded in their previous employer's culture and are thought to be less malleable or less receptive to a new organizational culture as a result. Third, older workers have less time remaining in their careers in which they could realize career potential that has yet to be attained. Further, they are viewed as having less upside potential because they are defined by, and potentially limited by, their resume or accomplishments to date. Fourth, experienced workers are distanced in time from their education and are perceived as having outdated skills as a result (Sicker 2002).

Boomer professionals, then, are faced with being more likely to be downsized and less likely to be hired than younger professionals (Nelson 2002; Palmore 1999; Rubin and Smith 2001; Sicker 2002). These perceptions, which align quite well with theoretical ideas of ageism and associated marginalization described earlier, are evident in many of the respondent's comments. Phil Rich, a 62 year-old entrepreneur following a career as an engineer and manager, offered the following perspective:

As you get older and older and older they want somebody that's newer and fresher, has newer education and who has time to progress to the VP or the President's job and if your fifty years old you don't have time to do that so they don't want you, and you're stuck. You're preconditioned to do things in ways that other people trained you and they don't want to have to fight your ways of doing things, they want you to learn their ways of doing things.

David Driver, an unemployed technology manager, simply observed that, "a lot of times the hiring managers are young, like maybe in their early 30's, and they feel intimidated by an older person. They want, you know, malleable, younger people; they don't want people telling them

what to do.” Fran Kline, a veteran of one of the Big Four consulting firms, provided a more scathing point of view from her experience: <sup>11</sup>

So I think what it was all about, was in the end they were looking for twenty something year old people who were Stepford wives, they wanted total fealty [to headquarters], nobody who would question. And if you look at the people that they have put in positions of authority, everyone there is somebody who is a good Lieutenant, will follow unquestioningly what the orders are. And if you were somebody who questioned or said “no we’re not gonna do that, because, you know, experience has shown that duh duh duh,” oh man you were shot on sight.

Curt Devine, a 52 year-old CEO of a non-profit business, summed up ageism as follows:

For instance it’s really hard for a tech guy at 50 to be considered a tech guy by a 20 something, even if they are-been a tech guy their whole life. And some had a specialty that is obsolete, you know, but even though there’s still mainframes out there or whatever, ...and it’s same thing with management and marketing and whose up with current issues and financial issues and so it’s more nefarious than simply being, it’s the cheap way to go [i.e., cutting larger salaries].

Perhaps they could not change the fact that ageism and age discrimination exists, but, most participants indicated a belief, in some form, that age perceptions are something to be managed or actively negotiated. Their training and experience taught them to recognize obstacles and take proactive steps to achieve their goals. They took conscious steps to alter others’ perceptions of their age. Appearance was a major component of managing age perceptions. Boomer professionals evaluated their appearance and made modifications to look younger.

Joan Bell, an unemployed paralegal stated, “I present myself as a professional. You wouldn’t have known that I was 53 if I hadn’t told you, ‘cause I don’t look 53.” Amanda Jones, a 60 year-old Human Resources executive, had cosmetic surgery—a facelift—in order to present a more youthful appearance. Tony Vaughn, a 46 year-old marketing manager “had a beard, close-

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<sup>11</sup> The Big 6 refers to the six largest accounting and professional services companies: Arthur Anderson, Coopers & Lybrand, Ernst & Young, Deloitte & Touche, Price Waterhouse, and KPMG. They often are thought of as auditing firms because they have the corner on that market. The Big 6 became the Big 5 in 1998 when Price Waterhouse and Coopers & Lybrand merged to form PricewaterhouseCoopers. The Big 5 then became the Big 4 in 2002 after Arthur Anderson discontinued their auditing practice following the 2001 Enron scandal (Glater and Creswell 2006).

cropped, [but he] shaved it for the interview process.” David Driver, “after 25 years, shaved off my mustache because they said that it’s gonna get in the way of your job search.” Curt Devine lost weight, stating “when I started looking for a job, that’s when I went on a diet.”

Curt Devine offered interesting insight from his experience in what he referred to as “CEO Academy,” an executive consultant for high-level executives. He described their advice as follows:

Some simple, some not so simple. Like, think about how you’re dressing, and they would have a whole thing on appearance to make sure-not that you would dress down but you would dress more now than 30 years ago. They talked about how you need to make sure certain skills are emphasized, so they’re more relevant now than other types of things, so-for instance, handling big P&L’s are not as important now as skill sets, they would say, don’t talk about all this big stuff you’ve done, you’ll overwhelm them, they’ll think you’re over-qualified, you know, so focus on the skills that you bring more than that.

Managing age perceptions ranges from accentuating the positives of experience to trying to look younger. Whatever the individual approach to the problem, there is a near unanimous opinion that ageism comes with the territory. Most participants made statements that indicated that it is incumbent on the older worker to manage how he or she is perceived. No one was particularly outraged. Acceptance was the norm.

Tom Frost, a 59 year-old former sales executive, had a typical, if somewhat matter-of-factly stated, attitude. He concluded, “Age is working against me [trying to find a comparable job in sales] and I don’t have any illusions about it.” But he would not let age prevent him from obtaining desirable employment; “I will let it keep me out of the game if I can’t present sound arguments to disarm it. If I can’t I’m kind of hosed.”

Identity theory suggests that a difference between how one is perceived and how one sees herself would be a source of distress because her reflected appraisal does not match her identity standard. A change in behavior or an attempt to change the situation is predicted as the

individual tries to alleviate the distress. In this sense, the behavior indicated by the participants is an attempt to alter the situation by changing their own behavior because they cannot change the broader behavior of others. The extent to which this approach was reflected in shared meanings among the participants suggests structural forces are involved.

### Youthful Age Identities

Boomer professionals have age identities that are younger than their chronological age (Croker 2007; Freedman 1999; Kaufmann and Elder 2002). They think of themselves as younger, and they act younger, than their actual age. Their self-meanings are based on a youthful age identity. Arguably, this group (and likely other sub-groups of boomers) is redefining what it means to grow older. For example, what it means to be fifty-five years old has been redefined to include more youthful activities than were generally acceptable at that age for previous generations (Dychtwald 1999; Jones, Whitbourne, and Skultety 2006; Logan et al. 1992).

In many ways the word “old,” or the thought of being old, has negative connotations for boomer professionals. Both men and women make a conscious effort to look younger. What others think of their age is important to them and they are acutely aware of those perceptions. Many of the women that I interviewed offered the unprompted opinion that they look younger than they are. Some of the men did the same. This effect seems stronger among women, but it is also a significant influence for men.

My insight into age perceptions came within the context of work, so I’m reluctant to extend the observation beyond work roles. However, boomer age identities have been shown to be more youthful in various role identities (Croker 2007; Freedman 1999). As a trend, as a social construction that is becoming more entrenched with time, boomer professionals may be “ahead of the curve” as having youthful age identities. For the most part they have not had difficult lives

in terms of physical labor. They have generally had access to good healthcare. They are educated, which has been shown to correlate with healthier lifestyles (Ross and Wu 1995). They have had the financial resources to eat well and purchase products that contribute to health and a younger appearance.

Rather than aging itself, or broader perceptions of aging, it is this one aspect of aging, youthful age identities, which seems to hold the most meaning for boomer professionals. One could argue that it is structure that develops from a U.S. culture that worships youth and a corporate youth culture that creates youthful age identities among boomer professionals. I suggest, instead, that the external expectations of youthfulness, as well as the internal standards of boomer professionals generate the structure in question. Boomer professionals are expected and expect themselves to be youthful. They have internalized the youth culture and it now represents structure. Boomer professionals are embedded in the very structure that they create and shared meanings within the cohort of being youthful is, in fact part of the structure that influences their identity as workers. The youthful age identity that results from U.S. and corporate youth cultures, in which boomer professionals are active participants, becomes the structure that comprises the effect that I have described.<sup>12</sup> It is this age identity effect that has a major influence on boomer professionals' behavior in the restructured economy.

Indicators that suggest the underlying reasons why boomers are so indelibly affected by the desire to remain youthful were not particularly enlightening. The U.S. youth culture and the corporate youth culture are so omnipotent that more nuanced insight is occluded. Certainly boomers are the generation that once claimed to not trust anyone over the age of thirty. However, youthful age identities do not seem to stem from issues of trust, but more from a need to be

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<sup>12</sup> Age involves no choice and, as such, is purely structural. I propose that age identity be viewed more as structure than as an identity. In fact, I suggest that an identity (age) structurally affects an identity (work). In this regard I view age identity differently than other role identities, which I would not consider to be structural.

relevant. It is a generation that, for many boomers, effected social change at a relatively early age. Boomers have played an important part in all aspects of life in the United States ever since. This is partly because of their sheer numbers, but also seemingly due to an assumption of being relevant. Boomer professionals, in particular, have been catered to throughout their lives. While no one would suggest that the world owes boomers a living, that has effectively been what boomer professionals have experienced for much of their career. Job recruiters came to them on campus and offered a choice of jobs at attractive salaries. Once in a job, the company had systems in place to help assure that boomer professionals would be successful workers. Their salaries increased. They spent. They saved. In general the economy grew and their savings grew with it. For most boomer professionals, problems were not encountered in the workplace until the past decade of economic restructuring.

Now, many boomer professionals find that they are no longer in demand. Advertisers do not even seem to want their money as generally younger consumers are targeted. In the workplace, their sense of job security has been severely shaken. With the recent economic downturn, 401k savings have lost substantial value and a future that once seemed financially secure is now in jeopardy. All of these changes have dramatically diminished the relevance of boomer professionals, leaving them to question what has been lost, how to get it back, how to be relevant again. The answer, for many is youth. Youth attracts job offers and job security. Youth provides time to recover financially. Youth promises a return to the relevance of earlier days when life was easier.

All indications are that boomer professionals have adopted youthful age identities in part because of the youth culture that prevails in the United States. However, more subtle indicators suggest that this generation, and particularly the professionals among them, have taken the



pursuit of youthful age identities to a higher level because of the history of being relevant and the experience of how easily it can be lost.

In this sense, youthful age identities are adaptive as workers strive to fit in and thrive in youth-oriented work environments. The pursuit of youthful age identities is a distortion because the corporate youth culture acts to marginalize older workers and participants' accounts suggest that ultimately ageism is insurmountable. Scholars have suggested that individuals in the boomer age range are more likely to adopt youthful age identities than older age groups (Dychtwald 1999; Jones, Whitbourne, and Skultety 2006; Logan et al. 1992). Arguably, boomer professionals are on the leading edge of this phenomenon and are contributing significantly to the construction of structural expectations for workers with youthful age identities.

Based on this analysis, I consider youthful age identities to be a structural adaptive distortion, related to aging, that is similar to the five previously identified adaptive distortions cited previously as related to economic restructuring. The cumulative part that these six adaptive distortions, and other structural effects, play in worker role identity formation is addressed in the next chapter.

### **Aging Boomer Professionals within the Context of Economic Restructuring**

I examined how youthful age identities relate to outcomes in the restructured economy, concluding that those who had more youthful identities generally seemed to fare better in the changing economy. In order to assess these relationships, I examined the variation in age identities by ranking each participant on a scale from zero to minus seven, depending on how much more youthful than their chronological age they behaved. A participant who behaved in line with their age was ranked at zero and a participant who behaved significantly younger than their chronological age was ranked a minus seven. The average age identity was minus 3.5 years,

consistent with the idea that youthful age identities are characteristic of the group of participants as a whole. I considered their behavior based on indicators from their narratives and their behavior during the interview. I then analyzed the relationship between youthful age identities and other variables. Three aspects of youthful age identities were noteworthy.

First, the 13 participants who had successfully negotiated a post age-40 career interruption all had age identities of at least minus two years. They averaged four years younger than their chronological age. This was more youthful than the average for the entire group of participants. Further, none of those whose age identity was close to their chronological age had successfully exited transition.

Second, I considered the relationship between youthful age identity and whether participants who were in transition at the time of the interview had a positive or negative outlook. Those with a positive outlook exceeded the average for the overall group in that they had more youthful identities. Those with a negative outlook had substantially less youthful age identities, averaging only one year less than their chronological age.

Based on these first two relationships with youthful age identities, there seems to be a correlation between positive outcomes and more youthful age identities. The relationship may be due to the need to project youthfulness in order to succeed in reentering the corporate youth culture. That is, those who successfully projected youthfulness during my interviews also projected youthfulness in their career pursuits, which paid off in terms of acquiring new careers and having positive outlooks. It may also be that negotiating transition requires youthful energy and persistence, which resulted in those with youthful identities being more successful in terms of outcomes.

The third observation regarding youthful age identities was that those with more youthful identities were more likely to pursue non-traditional careers. Participants who had, or were pursuing, entered business ownership or reinvented their career had slightly more youthful identities than those who reentered or pursued traditional jobs. Qualities of self-efficacy and authenticity, which I explore in depth later, generally related to non-traditional careers and more youthful age identities.

Also, I investigated meanings associated with aging looking forward by asking each of the participants to tell me what the future likely holds for their career. Drawing upon these data along with previous assessments of economic restructuring and the analysis thus far in this chapter, I offer some ideas about the future of boomer professionals in the restructured economy.

First, the typical boomer professional is not likely to completely retire. Most of the participants do not have a specific retirement goal. Many defined retirement as “working part-time.” For example, Phil Rich stated, “I’m too much of a workaholic, I like work. Retirement to me means working half time, and it means doing work that I enjoy and having the luxury to turn down work that I don’t enjoy.”

Tina West viewed “retirement in the sense of not working 12-hour days. I write a blog...I love to write and would love to have more time for that.”

Marie Pierce summed up her feelings, concluding, “Retirement’s not in my vocabulary. So for me, the day that I’m done, I’ll be done. And up until that time I want to have a good time and I want to contribute and participate.”

Boomer professionals think that they have a lot to offer in the workplace and work continues to have a great deal of meaning for them. Some will need to work, primarily because of recent investment losses in retirement savings, but many have planned to be able to retire

financially. Most will work because they want to, because it provides fulfillment, a feeling of contributing, a sense of authenticity, or a social outlet. Work is too central to their identity to envision doing otherwise. Mike Noone summed it up as follows:

I'm not worried about the future. I have lots of knowledge; lots of skills...opportunities come up every day. I'm just going to keep working hard, looking for opportunities and I firmly believe that I will...come into projects that are very lucrative, I'll be in a position to act on them, and I just never know when the phone rings what's going to be on the other end. I don't worry about will I have income.

At the same time, however, growing older and continued restructuring of the economy will rechannel the part that boomer professionals can play in the workplace. While fewer jobs will be attractive to boomer professionals because of their desire for authenticity, the restructured economy will offer fewer jobs that corporations find acceptable for older professionals. For example, technology jobs will become more and more inaccessible as new technical skills evolve in which older workers have not been trained and as more jobs are outsourced overseas. Middle-management will continue the current youth movement as hiring managers become relatively younger. Fewer boomer professionals will be able to sustain middle-management careers. Executive jobs can be expected to remain more accessible, particularly to younger boomers who bring experience from the dot.com era or in managing global companies. The net effect is likely to be fewer mainstream (primary economy) jobs as boomer professionals are either relegated to, or seek out, niche jobs.

## **CHAPTER 7 - WORKER ROLE IDENTITIES**

Having previously examined the structural effects that exert the most influence on boomer professionals' worker role identities, I now turn to how these role identities develop or are altered, particularly in terms of structure. Worker roles involve specific social positions, typically jobs, but may also include activities to enter business ownership or to prepare for a new career. I also consider the period of transition between work roles from an identity theory perspective.

### **The Worker Role**

The worker role for professionals in the corporate world has changed dramatically over the past thirty years with significant change occurring during the most recent decade. Because professionals working for corporations are generally salaried exempt and are employed "at will" with no union representation, companies face few limitations in the nature and amount of work that they can demand. As increasing numbers of boomer professionals have been downsized, those who remain employed feel compelled to work as long and hard as necessary to keep their jobs. The worker role, then, has expanded to take more time or a higher priority relative to other roles for many professionals.

The immediacy of the worker role was indicated in several narratives from this study. Many workers related discomfort with having to be available 24/7 via cell phone. Others pointed to travel expectations including short notice, such as leaving on a weekend with no prior notice, and trips that cannot be declined. One account cited a woman whose mother died, but could not cancel a planned business trip. Most saw these examples as a recent trend that diminished worker preference and privacy in exchange for managements' perceived needs of the organization.

Role conflict and role strain seemed to be an increased component of professional employment (Coverman 1988; Marks 1997). Most study participants worked between fifty and sixty hours per week and eighty hour work weeks were not uncommon. Most checked email during off-hours and were available around the clock via cell phone. The increased hours and decreased privacy intruded on other roles, such as that of spouse or partner, parent, and leisure related roles, resulting in an increase in role conflict and associated stress. One of the more dramatic narratives involved managing the financial aspects of an acquisition involving her company while on maternity leave. Nora Reese recounted the experience as follows:

I had a baby and we were in the middle of trying to do a management buyout. When [my boss] came to run [the company] it was done with the understanding that he would be given the opportunity to buy it. So, [right after the baby was born] we were given permission to do a leveraged buyout. So the whole 6 weeks I'm on maternity leave, the 1<sup>st</sup> week I had nothing, then I'm working on due diligence....I have permission from the corporate CFO to work with the debt-holders, to work with the investment bankers. So I'm doing due diligence, I'm in meetings, I'm doing all the things...one of my peers, we had to meet and I'm upstairs breastfeeding and he's downstairs, I've got the door open and we're yelling back and forth. It was stressful, I was working extremely long hours. You know, I was pumping and so after about 13 weeks I had to...you know the stress just kinda dried up the milk. We got it done though. We made it happen.

Role strain has also increased as more tasks are expected to be completed in the course of a normal work week. Higher levels of stress are generally associated with today's worker role (Kaufman 1982; Marks 1977; Simon 1997). Amy Gliss, a 55 year-old lawyer and contract negotiator for a Fortune 50 entertainment company, recalled the company's response to her having a heart attack a few years ago, "I took 3 months off. It really scared the hell out of me! So I took 3 months and they were PISSED OFF that I wouldn't answer my phone, I turned off my Blackberry, I was trying to figure out what I needed to do with my life."

The boomer professionals in my sample had mixed thoughts on the implications of the changing work role. There was general agreement that work had become more intrusive and jobs

more tenuous. However, some embraced these changes while others experienced negative consequences first hand. 54 year-old Tina West seemed happily immersed in the fast pace of forming a technology start-up company even though the stress was significant—she risked losing her house to fund the venture. On the other hand, Andy Berry, at 62, was reticent to put in long hours even though he admitted that one of the recurring reasons that he lost several jobs was a perceived lack of effort. In contrast, Ed Hardy, at 62, could not wait to get on to the next adventure after being affected by a recent reduction-in-force. His energy level was very high and he intended to fully invest himself doing work that he considered worthwhile. However, Ben Clark, a 60 year old ex-advanced development manager in the beverage industry, confided that he'd like to grow his current consulting business "if I could without having to hustle too much for the business, because like I said I'm not overly ambitious...I've never been an ambitious person. All the work I got at [the beverage company]...the promotions...I never looked for a promotion."

Although the respondents lacked a consensus on the meaning that they attached to the higher pace and demands of today's work role, they did agree that the relationship between employee and employer has changed for the worse. Nearly every participant reflected about the time earlier in their career when companies were more humane. The loyalty that firms had toward employees that contributed to their business and the loyalty that employees felt toward a company that sheltered them from economic downturns has largely disappeared. Formerly motivated by a need to have the human resources in place to take advantage of economic upturns in exchange for employee allegiance, companies no longer develop a relationship that offers career continuity (Capelli et al. 1997; Rubin 1996).

Meanings attached to this relationship in contemporary corporations are characterized as unfeeling, uncaring, and insensitive. Companies are seen as treating employees as though they are disposable. Decisions are made in the interest of short-term profits while the longer term objectives are thought to have been abandoned. Corporations' behavior is exhibited in highly visible actions such as downsizing, but also in tactics such as deskilling where jobs are stripped of requirements that necessitate trained workers or employees that are unique to a given firm. Subtle cultural changes, such as reducing workers in an attempt to increase shareholder value, are readily perceived by workers as indicating the extent to which the relationship has changed.

Workers have responded to these changes in the employee-employer relationship—brought on by economic restructuring—by reassessing their own loyalty. They see that they need to prepare for the possibility that they will be downsized no matter how secure they feel. Rather than limiting their networking internally to the company, they develop contacts on a much broader basis. They evaluate opportunities based more on the value to their career rather than the good of their company. Workers have learned to look out for themselves.

The role of professional worker has been significantly altered by economic restructuring in ways that held substantial meaning for participants. First, is the human energy that is demanded as those who remain employed are expected to work longer and harder. This has become a social expectation as company's expectations have been infused into the broader social view of work. Second, is the pursuit of profits without regard for employees. This is reflected in the implicit contract between employee and employer that has weakened at best to the point of indifference and, at worst, to hostility on the part of employers. Workers do not like it, but many seem to have accepted it. The newer diminished relationship has become a part of the social expectations of work and the worker role is defined accordingly. Today's worker is expected to



cope as reciprocity has been reduced to short-term pay for performance. Thus, the professional worker role, in a continuous state of change, has adapted to the instrumental-rational profit motive.

Older workers seemed to have issues with authenticity that involved both aspects of today's worker role. The demand for human energy, particularly as reflected in long hours, was raised as an issue by several participants. Their role identity differed from the broadly accepted worker role in that they do not wish to spend as much time working. The term balance was often used. They sought more balance with other roles. None suggested that they had less energy for work or less desire for work, however, the long hours that were once viewed as a career investment were less palatable to boomer professionals. Further, some wanted more time to investigate new areas that may also be fulfilling.

The second aspect of today's worker role, instrumental-rational profit-seeking, was raised as an issue even more often. Boomer professionals wanted a role identity that makes a difference, has social relevance, or matches their individual values. Profits are fine, but they must be pursued in acceptable ways. Although they embraced capitalistic ideals, boomers often also insisted on a value rational aspect to the profit motive.

Tom Frost stated, "I don't want to live to work; I would like to work to live. Probably the biggest challenge that I have right now is relating the things that I enjoy the most, and the things that I have the most fun with, to things that I can make a living on. Finding that niche...I haven't been able to put that together yet." Curt Devine, who spent the early part of his career working in public service on Capitol Hill, drew a comparison between that experience and his current career goals in the private sector as follows:

[People in public service] could get up in the morning and felt you were as much a part of a cause as you were at business school, that you were trying to

accomplish something for the good of the whole, and that's what fired up my passion. And so the job I wanted was not just any general manager job or even with a good company or with a-I wanted something that I could get passionate about and I had too many recent corporate experiences where that wasn't the case and so I wanted to try and find the hybrid that said, let's find something that has that core goodness to it but at the same time where you can, you know, rapidly pursue, in a somewhat entrepreneurial way, growing something, making something successful.

Overall, boomer professionals tended to seek a work role identity that is truer to themselves.

To try and clarify the value aspect of boomer worker role identities and to contextualize the value aspect in terms of economic restructuring, I asked about reengineering. Many of the participants have been involved, or are involved, in process improvement processes such as Six Sigma or Lean Manufacturing. These are reengineering programs that seek to make business and manufacturing processes more efficient. Generally, the efficiencies cut costs, thereby increasing profits, and often involve reductions in personnel.

My line of inquiry centered on an apparent contradiction in the desire for more value-rational profit-seeking and conducting reengineering. None of the participants that have engaged in reengineering seemed to view this as a contradiction. There was no tolerance for waste in the name of preserving jobs. If less people were required to accomplish a task, then so be it. In this case downsizing had a legitimacy associated with it. On the other hand, if downsizing was done to manipulate stock prices, help achieve executive bonuses, or in any way cut costs by shifting the burden to remaining employees, then downsizing was viewed as unacceptable. Thus, the desire by boomer professionals for more authentic role identities was not an issue with "responsible" profits, but with pursuing profits indiscriminately.

The worker role, then, has changed for boomer professionals in that they want more control of their time and a better alignment between their work and their values. Where earlier in their career the work that they did may have strongly influenced their sense of self, they now

aspire to work that reflects their “true,” or at least current, sense of self. Within the context of their search for authenticity, they have generally accepted the restructured economy as necessarily competitive and profit-oriented. They understand the global economy, that competitive strategies are required, and that organizations must be tactically proactive. As a result, they accept downsizing and other cost-cutting measures as requirements in the corporate world. Although downsizing is difficult and personally distressing, boomer professionals seem to accept the conditions that have, or are likely to, place them in transition.

### **Role-Exits and Transition**

The 33 participants in my research were in transition a total of 84 times after they had reached the age of forty. Of these, 16 occurrences of transition were voluntary, involving various situations such as the following: (1) Tina West quit her job over an ethical disagreement without having another job lined up, (2) Fran Kline quit her job on her doctor’s advice due to job related stress, (3) Vic White chose not to move to Seattle from Atlanta when his company was acquired even though he had no other job prospects at the time, and (4) Mike Noone resigned in order to start his own business.

Two transition experiences involved what I classified as internal transitions. Internal transitions involved workers whose normal job function had been terminated even though they remained on the company payroll. Ben Clark was told that he had six months to find another job within the company and finding a job was to be his full-time job. Fran Kline was told that she would have to re-interview for her job and that she would either be “talent-matched” to a new position or terminated depending on the outcome of the interview. During this process she was paid, but was without a role in the organization until the talent-matching was completed. Internal

transitions had all the characteristics of a job-search with the exception that the worker remained on the payroll.

The remaining 66 instances of transition were more traditional cases where participants were downsized. The frequency with which boomer professionals experienced transition was stunning. Andy Berry was in transition seven times after a steady 25 year career with two power companies. Twelve of the participants experienced just one involuntary transition, but the average across all participants was two involuntary transitions per worker. Certainly, transition has become more common, but the increased rate at which individuals were affected was significant. Transition cannot be conceptualized as a once per career situation.

Another significant finding was that boomer professionals often spend a considerable amount of time in transition between worker roles. The amount of time spent in transition increases with age and with higher level positions (Bolles 2001; Capelli et al. 1997; Nelson 2002; Sicker 2002). Some participants spent as much as two years in active job-searches. Further, as downsizing has increased and more experienced workers are on the job market, job-searches take longer. In addition to longer job-searches, the increased frequency of downsizing results in workers being forced into transition more often. The time spent in transition, as a proportion of time spent actively engaged in their career, has increased for many boomer professionals.

Identity theory scholars generally consider transitions such as these as role transitions or role-exits (Ebaugh 1988; Wheaton 1990). Ebaugh (1988: 1) defines role-exit as “The process of disengagement from a role that is central to one’s self-identity and the reestablishment of an identity in a new role that takes into account one’s ex-role.” This is a valuable construct for understanding role-exits such as divorce, retirement, and college graduation. These are situations

where an individual generally exits a role once and then transitions, over a relatively short period of time, to a more stable role (e.g., a retiree transitions to the traditional role of retirement).

Certainly, workers who lose their jobs experience a role-exit as they leave their former work role behind. Job loss has been compared to losing a loved one with workers thought to progress through phases similar to the stages of grieving the loss of a loved one (Ginsburg 1942; Kanter 1984; Kaufman 1982). However, no one in this study seemed to dwell on the past, although clearly some felt a deep sense of resentment, particularly those with long-term relationships with one company. Andy Berry recalled, “I look back and say all the training I went through, all the time in graduate school, all the sacrifices, it’s all in the past. It doesn’t apply now.” Brian Wood, at 57 and after over a quarter-century in middle-management with a Fortune 100 computer company, although not resentful toward his company, railed against “greed in the corporate world” and vowed “never to let them get a piece of me again.” Overall, though, those in the study moved on and quickly began looking forward.

Some workers got used to receiving the news. Early in her career, Tina West responded by saying that “it was devastating, it seemed like the world had come to an end. Yet later in her career she accepted it as part of the advertising business. “Accounts come and go, people come and go,” she reflected. Others like Ben Clark, a longtime employee for a beverage company who had a severance package, took the news in stride. He recalled, “I had 15 months to find something and I thought I could do that. Although I was a little insecure about it...”

As I investigated the role-exits that participants experienced I questioned the value of role-exits as a construct for understanding transition in its entirety. In assessing the applicability of role-exits to periods of worker transition, I considered the following: (1) Transition often occurs multiple times over the course of a career while role-exits are generally applied to role

changes that occur once over the life course; (2) Transition is increasing in duration and generally lasts longer than role-exits that have been studied; (3) Transition frequency is increasing for older workers; (4) Role-exits are more periods of adjustment, whereas transition involves goal states that require substantial actions beyond adjustment; and (5) I am interested in understanding one specific type of transition whereas role-exits are valuable constructs for understanding the characteristics that are shared by all types of role-exits.

### **Transition Role Identity**

I concluded that the role-exit construct is not sufficient for investigating worker role transitions. I suggest, instead, that being out of the traditional worker role involves a generally short process of adjustment, a role-exit, followed by a new role that I refer to as transition. The most common entrance into the transition role in the contemporary workplace is when a worker loses his or her job. Their reaction to this role-exit may involve a traumatic response to an unexpected event, but quickly changes to the worker occupying a new and substantially different role from other roles that he or she has experienced. It is this transition role that I examine at length in this chapter.

Once the worker accepts his or her downsizing, they move into transition where they conduct a job-search, evaluate alternative business opportunities, determine new career paths, or decide not to participate in the labor market (either temporarily or permanently). Transition encompasses all of the steps a worker takes to resolve having lost a salient worker role. For purposes of examining the longer-term, and often repetitive, process of transition, I propose viewing transition as a separate role.

Many of the workers in my study had occupied several transition roles. Others had been in transition only once. In some cases, workers had entered the transition role as a precursor to

different work categories. For example, Tina West occupied a transition role early in her career in which she decided to reinvent her career, moving from sales to advertising. Over the course of her career, she occupied transition roles several times as she moved from one traditional advertising job to another traditional worker role in advertising. Later in her career, she became disillusioned with advertising companies and transitioned to a contingent worker role. Recently, she has moved from a transition role to an independent worker role as she implements a plan to create a start-up company. As Tina exemplified, boomer professionals' careers could not always be easily classified by the type of worker role they occupied. Rather, careers were generally more fluid and often involve time in multiple worker role categories.

By using the construct of a role to investigate transition, I focused on the unique attributes of work transitions and the characteristics that all work transitions share. Roles in structural symbolic-interactionism are constructed through social interactions, framed by social structure, and are fluid in the meanings that they hold for role occupants and those who interact with role occupants. In order to qualify as a role within the context of identity theory, certain conditions must be met. I established requirements for proceeding with this line of inquiry as follows: (1) Transition must be an accepted position in the social order; (2) There must be definable social expectations for an individual who occupies the transition role that facilitate the process of role-taking; (3) There must be evidence that role occupants attempt to self-verify against an identity standard in order to maintain the transition role identity; and (4) role occupant behavior in transition must be related to his or her transition role identity.

I address each of these criteria at length in the remainder of this chapter and the next. In the following sections of this chapter I focus on transition role acquisition consistent with Stryker's (1980) structural symbolic-interaction strand of identity theory (Stryker and Burke

2000). The first two criteria are exhaustively addressed in my analysis of transition role acquisition. In the next chapter, I focus on identity maintenance consistent with Burke's (1991) internal identity processes strand of identity theory (Burke 2006; Burke and Stets 1999; Stets 2006). The last two criteria are fully addressed in that analysis.

There are two aspects of shared expectations of roles to consider. First, roles are shared expectations for the behavior of individuals who occupy social positions that are legitimated by their classification within society. The emergence of transition as a role in these terms is a relatively recent phenomenon. When downsizing first started to become common, the idea of transition was not well-defined. People who were out of work and searching for a job were met with sympathy, or worse, they were avoided. During the past decade, however, such workers have increasingly been labeled as being in transition. Those who were in transition readily accepted the label because it gave them a sense of being in a situation that was legitimized by society. A set of expectations have developed that are recognized by those who are in transition and those who interact with them. Primarily by becoming more common, transition has become more acceptable. Everyone knows someone who is, or has been, in transition. Now, rather than avoidance, people try to think of ways they can help, typically through network introductions, when they meet someone in transition. Shared meanings exist regarding what is involved in transition and what is expected of these workers in various situations.

Second, roles are actively negotiated by role occupants and others with whom they interact in social situations (Reitzes and Mutran 2002). Who are the other participants in the social situation? Who interacts with workers in transition and contributes to the construction of expectations for the transition role? Family and friends certainly play a major part in this process. Outplacement, either formally as companies that advise workers in transition, or informally



through ad hoc groups serving this purpose in organizations such as churches, provides counselors that convey many of the expectations of transition. Associates in outplacement, hiring managers at companies with job opportunities, networking contacts, and mentors all interact in the definition of transition. Former coworkers, financial advisors, Human Resources personnel, unemployment counselors, and the media also have some say in transition. A worker in transition is quickly indoctrinated to the expectations of the role.

The transition role has become institutionalized through the organizations in which unemployed workers participate. Outplacement groups, particularly firms that specialize in this service, tend to structure the role as they suggest that they hold the key to how to successfully negotiate the transition role. Outplacement firms are generally paid for by the downsizing company, therefore they cater in many ways to the corporate mindset. They create media, hold group meetings, and provide one-on-one counseling that structures the expectations of transition. They quantify the number of resumes that a worker needs to send out to get an interview and how many interviews are needed to obtain a job offer. They set goals for meeting network contacts.

Nora Reese kept a record of all of her networking activities and recorded the time that she spent with employed contacts and unemployed contacts separately. The working contacts were thought to be more valuable in her job search and the non-working contacts represented a type of good will referred to as “paying it forward.” She summarized these skills that she learned from an \$8000 investment in a career coach as follows:

I tried to network 100 hours per week. [The career coach] taught me how to take networking to more of a pay-it-forward attitude. So it’s more about face-to-face, more about relationship building, and more about networking with people who know you, like you, and trust you. And I’m good at it. My job is to find a job. My job is to be upbeat. My job is to do it better and network better than anybody else. And I don’t put myself in places that are negative. I don’t go to groups where

there are a lot of unemployed people. I try to network 70 percent working, 30 percent non-working. And I've got to be as good at this as I would be at my regular job."

While outplacement is a fairly common benefit among boomer professionals because of their status and seniority, not all receive this benefit free-of-charge. To fill this void, community groups have been formed to provide a similar service, particularly groups affiliated with churches. Some have a religious agenda while others are simply a more grassroots version of outplacement.

Many organizations have been formed to facilitate networking. For example, the Kettering Consulting Group was formed by several workers who were unemployed in order to make contacts and put a positive face on being in transition. Members can carry business cards that tout their position within the Kettering Consulting Group and use it to fill in periods of unemployment on their resume. Membership is restricted to those who made more than \$150,000 per year, allowing members to attach a degree of exclusivity to their group. Other groups offer networking opportunities as part of a broader mission. For example, Global Executive Women is a group of women that are director level or above and workers must be employed to be members. Other groups in the Atlanta area include Women In Technology (WIT), Financial Executives Networking Group (FENG), the American Marketing Association (AMA), and Technology Association of Georgia (TAG). These, and other, groups comprise some of the institutional structure that affects networking job-seekers.

Tony Vaughn offered his perspective on informal networking/outplacement groups as follows:

There are a number of career groups that have sprung up in the past 2 years, because of the recession. Some of them are church missionary groups and they don't evangelize while you're there, but what they do is give you a lot of very practical tools-develop a network summary, have a marketing plan for yourself,

don't be afraid to tell people that you're unemployed because if they don't know they can't help you. So, people, small groups gather, 10-15 up to a couple of hundred. One of them was called the Christ Centered Career Group, which I was told was 20 people...this would have been two years ago and it's now about 300 and that's just the Alpharetta branch...these are all mid- to upper-level managers, some applied trades, but the vast majority are white-collar professionals, mainly men, mainly 35, typically 45 plus, out of work.

Institutional structure has also formed in the employer domain. In the restructured economy the number of workers pursuing any given job opening has increased. This affords companies the luxury of listing job requirements that are very specific. Job descriptions sometimes read like a wish list rather than a list of needs. Curt Devine referred to the phenomenon as a blue squirrel:

A blue squirrel is a job description or a posting that seeks, you know, 10 years of this, 5 years of this, 6 years of this, experience here, experience there, and you look at it and it is so unique there's only one individual in the whole world who could really meet those qualifications and that happens to be the only blue squirrel there is in the world, right?"

Companies can be very selective in their hiring and the structure within these firms has changed over the last decade to reflect this fact. For example, the volume of resumes received is so large that many corporations have added personnel or technology to screen them. New or automated screeners cannot apply much judgment to screening resumes; therefore keywords have become a critical aspect of the screening process.

Whether emerging from employee groups or employer organizations, the structure that has formed around the transition role has grown tremendously and has become heavily institutionalized. Clearly, transition has become an accepted position in society and shared meanings that define the position have been formed to the point that institutions have arisen to facilitate or support the expectations that are associated with the transition role. Thus, the first criterion for considering transition as a separate role, being an accepted position in the social

order, has been met. Next, I consider the process by which role occupants form transition role identities.

### **Acquisition of Transition Role Identities**

When a worker enters transition they undergo a process of role acquisition in which they develop their transition role identity. This involves internalizing social structure associated with the role as well as instilling the role with individual characteristics that are agentive in origin. The lines between structure and agency in the formation of role identities are extremely fluid. In Figure 7.1, I distinguish between processes as dominated by structure and agency, but offer additional perspective below.

How do older workers take on the transition role and develop an associated transition role identity? Reitzes and Mutran (2002: 1) suggest that role acquisition is “an active process of (1) role taking, learning the shared meanings of roles, and (2) role making, negotiating role boundaries to reflect personal and distinctive meanings (Turner 1956). An important component of role-making is the infusing of roles with self-motives, concerns, and interests” (Goffman 1959; Stryker 1980). Figure 7.1 depicts the components of transition role acquisition that emerged from my analysis, based on the boomer professionals narratives provided for this study.

Structure, or underlying social patterns, acts to define an individual’s role identity as workers internalize the social expectations of the role. Hegemonic effects and career-track effects are both part of the overall structure influencing a transition role identity, however, Figure 7.1 shows these effects separately because of their relative importance. Hegemonic effects emerged as a particularly influential form of structure to boomer professionals in the previous chapter. Career-track effects were also shown to have a significant structural impact that varied

by professional level. In this sense, the figure is illustrative and is not intended to misrepresent the fact that role-taking involves all types of structure.

Agency also influences one's transition role identity in ways that are distinctly characteristic of the individual worker (Tsushima and Burke 1999). Individual identity meanings affect one's role identity, potentially through three different processes. First, roles are generally personalized to individual standards via role-making. Second, successes and failures in past roles contribute to shaping new role identities, including one's transition role identity. Third, self-motives, such as the desire to enhance one's self-esteem, are a key factor in the acquisition of one's transitional role identity.

Two potential points of contention arise in this role acquisition proposition as depicted. First, lingering identities can be viewed as both structural and agentic. The effect of lingering identities arises as structure through early career success and as agency through lingering identities that are unique to an individual. Second, self-motives are generally considered by scholars to be forms of individual agency, however I show prominent types of self-motives, self-esteem, efficacy and authenticity, as structural components of hegemonic effects (Cast and Burke 2002). I discuss these indefinite and fluid aspects of classifying influences on transition role identities in terms of structure and agency below (LaRossa and Reitzes 1993; Reitzes and Mutran 2002; Rosenberg 1979).

For most established social roles I would expect the dominant process to be role-taking, primarily through the internalization of shared expectations for the role. Role-making would typically be a secondary process in which the role occupant personalizes the role within the limitations of the structural constraints that bound the role. Role-taking would represent structure and role-making would represent agency (Reitzes and Mutran 1994; Turner 1956). However, the

transition role is a relatively recent phenomenon and is less structurally defined than more established roles. Still, I interpret the acquisition of the transition role as predominantly structural. I develop this perspective by describing particularly relevant structural effects that emerge from economic ideology and the worker's career track. Nonetheless, it is worth noting that while I am biased toward a structural perspective, I also view the transition role, because it is relatively new, as particularly open to agentive effects and strive to conceptualize it as such.

### ***Role-Taking***

Role-taking is shown in Figure 7.1 as the dominant means by which social structure influences the development of transition role identity. In transition role identity, role-taking involves internalizing the social expectations associated with not working and being between jobs. This occurs through interactions with people, acting both individually and through institutions, which influence how transition is negotiated (e.g., family, friends, outplacement services, networking groups). The unemployed worker adopts his or her perceptions of what the role involves by cognitively filtering and prioritizing the inputs received in these social interactions (Zerubavel 1997). Role-taking instills a largely structural view of transition that is aligned with the broadly accepted expectations of transition (Stryker 1980; Turner 1956).

Examples of shared meanings for the transition role as it applies to boomer professionals are as follows:

1. Transition role occupants all have an "elevator speech," a succinct statement of their work objective that can be quickly conveyed to another person, perhaps to someone in an elevator in the time it takes to go a few floors. The idea comes from the outplacement mindset that someone in transition should always look for opportunities and be ready to communicate their job-search goals. However, the elevator speech is

- used with networking contacts and at social gatherings as a way to provide some additional information to the disclosure that one is in transition. In this regard, it applies not only to job-seekers, but to those who are becoming independents with businesses of their own or reinventing themselves for an alternative career.
2. Networking is commonly perceived by those in the transition role as being the most expeditious means to achieving their objectives. Everyone networks and no one does so by explicitly asking for a job. The proper way to network is a ritualistic presentation of self in which situations and objectives are conveyed to others, but without any pressure being applied for the recipient of the information to act on it. The idea is that if the recipient knows of another contact that might be helpful, he or she will offer that information. The “rules of the game” are well understood and the general perception is that more networking increases the odds of your resume getting in front of someone who makes hiring decisions. Several participants in my research considered the interview for my research to be a form of networking, speaking to the indirect nature of networking, and I did introduce some of them to others who may be able to help them reach their goals.
  3. The support of significant others (family and friends) seems to be universally assumed and received. In this case the expectation of the transition role intersects with the expectations of other roles such as spouse or friend.
  4. The transition role is generally viewed to be conducted within the context of today’s restructured economy, but without accepting economic conditions as a significant limitation. The economy is perceived as something that can not be controlled, but something that boomer professionals in transition must manage in order to achieve

their objectives. Virtually every participant used the words “it is what it is” to describe the economy.

5. Those in transition are expected to act energetic, motivated, optimistic, and youthful in most public social interactions. If they are pessimistic or depressed, these feelings are confined to private interactions.

Role-taking, then, is a process which forms the basic framework for one’s transition role identity. The transition role is given broad definition within the social order, inculcating the role with the shared social meanings that are associated with a worker who is in transition. The process of role taking, then, involves definable social expectations for an individual who occupies the transition role, indicating that the second criterion for treating transition as a separate role has been met.

Role-taking, as a process of identity formation for the transition role, is strongly influenced by the same structure that defines worker roles. As shown in the previous chapter, hegemonic effects that stem from the ideology of capitalism and economic restructuring are significant structural forces. Hegemonic effects are apparent in the meanings that participants attach to transition and their behavior during transition. These effects are shown as a separate structural influence in Figure 7.1 because of their relative importance in defining the transition role.

The expectations of a worker in transition are set, in large part, by a society embedded in the Protestant work ethic, capitalist values, and the tenets of economic restructuring. This aspect of role-taking results from the broad hegemony that has established values of enthusiasm for work, perseverance, thrift, success, and opportunity as core American values (Bernstein 1997). The transition role, then, is shaped by these values. That boomer professionals behave according



to these values, as indicated by participant narratives, follows directly from structural hegemonic effects.

Further, the passive acceptance of profitability and competition as the essential and justifiable impetus of economic restructuring demonstrates that transition role identities are shaped by agreement with the ideology that led to transition. That is, boomer professionals do not seem to disagree with the underlying reasons that led to them being in transition. Transition role identities tend to focus on exiting transition rather than dwelling on the macro causes leading to being a transition role occupant. The structure associated with aspect of transition role identities is a hegemonic effect as well.

The ideology of capitalism and economic restructuring also undergirds several ways that boomer professionals seem to embrace or resist being in transition. These factors, which I have labeled adaptive distortions, determine how a worker negotiates transition and are a key aspect of role-taking that further relate to structural hegemonic effects. Overall, the transition role is perceived within the context of ideological distortions of varying sentence.

Transition role identities shaped by hegemonic effects are not necessarily specific to boomer professionals. Workers of every age and occupation are affected by ideology, however adaptive distortions may differ, to varying degrees from other cohorts. It is important to consider the possible ways that boomer professionals uniquely form transition role identities. My intent is to advance a theory of transition roles based on interviews with boomer professionals. Generalizing these ideas to other groups in the workforce is limited by the extent that boomer professionals are unique. It is in this spirit that I discuss boomer professionals as a cohort. Proving or disproving the presence of any such cohort effects is not possible with the research that I have conducted, nor is it an objective.

There are cohort effects that are the result of shared history and culture that are unique to the baby boom generation. Boomers have many significant events that they have experienced in their lifetimes in common. For example, man's first steps on the moon occurred during formative years for most boomers. The social movements of the mid 1960's similarly were major influences on many boomers. Arguably experiences differ over the eighteen-year span that we categorize as the baby boom; however, the influence of these broadly shared experiences tends to have had an impact on boomers that differs from the impact of these events on other generations. Boomers have been shown to be more individualistic than previous generations, a cohort effect that can be viewed as structure that influences boomer identity and behavior (Freedman 1999). In the transition role, the expression of individuality may be more specific to boomers than the general expectations of transition role identities.

Other cohort effects may be even more specific to boomer professionals. For example, boomer professionals generally experienced labor markets early in their career that were based on a high demand for their education and skills. Internal and industry labor markets developed to attract career-minded boomer professionals. No other group of workers experienced a workplace that was so designed to assure their success as did boomer professionals. Early career success has a lingering structural effect that influences current occupants of transition roles.

Again, this expectation matches my findings as participants' career narratives typically begin with stories of immediate success and rapid career growth. Boomer professionals experienced early career success. They expected the positive experience to continue. They were generally unprepared for a lack of success. These are substantial cohort effects that have had a similar impact on most boomer professionals' identity. Their worker role identity was marked by success and, similarly, their transition role identity carries a high degree of confidence.

Expectations for the transition role identity, accordingly, are positive. The boomer professional in transition is expected to be self-assured.

Thus, characteristics that might be considered to stem from individual agency, such as individuality and optimism may actually be part of the structural boundaries that influence boomer professionals' transition role identities. My findings support the idea of boomer professionals in transition being undaunted by their situation. They expect, and are expected, to succeed as individuals.

Tina West believed that she is the best person, the one who is uniquely qualified to undertake the business venture upon which she has staked her future. Phil Rich thought that his experiences have taught him to see opportunities no matter what the economic situation. He believed that he can take advantage, perhaps better than anyone else, of these opportunities. As a boomer, he suggested that, "Right, we can do it, we did it before, we can do it again." Jan Leary, a 48 year-old unemployed PhD career counselor was less than three weeks removed from losing her job at the time of our interview, yet she exuded a contagious sense of confidence and optimism that was striking even in the context of most of the other participants displaying extremely positive attitudes.

Their attitudes seem to be more than a belief in their agency as individuals; it seems to not only be built into the expectations that they have of themselves but into the expectations that others have for them. For boomer professionals, the transition role comes with a presumption of success. Although I do not exclude agency from the role acquisition process (see below), I do conclude that a significant part of the positive attitudes that boomer professionals embody stems from the structure that frames their identity.

As a social process involving individuals, role-taking does not produce exact copies of transition role identities in every downsized worker. Each worker has a unique set of social situations that influence his or her role identity. Each worker interacts with a unique set of institutions that exert structural forces on his or her role identity. Broader perceptions of higher order structure, such as economic restructuring, influence role identities somewhat differently. Boomer professionals experience varying cohort effects in the process of role-taking. The result is that, without considering agency, there is considerable variation in the transition role identities that boomer professionals develop.

An additional area, in which considerable variability among participants' transition role identities emerged, had to do with the level that they had attained in their career. I concluded that there are three career-tracks, detailed earlier, that are notable in how they structurally impact the transition role. I've categorized these three career-tracks as (1) CXO's, (2) middle-management, and (3) individual contributors. Career-track effects are shown in Figure 7.1 as an additional type of structure that seems to have a disproportionate impact on transition role identities.

### ***Role-Making***

Turner (1956) suggests that role-making is part of the role acquisition process that allows for individual agency as role occupants personalize the roles that they acquire. Role-making is depicted in Figure 7.1 as the primary path by which agency influences transition role identity formation. Role-making is evident in respondents' narratives of their transition role identities in which they bring additional individuality to their roles. Jan Leary and Donna North, a 53 year old marketing manager, instilled their transition with a deep belief, beyond the structural expectation of a positive attitude, that things will work out for the best. Fran Kline and Earl Birch infused the role with their religion and Marie Pierce and Joan Bell with their spirituality. Brian Woods

applied a standard of not being further marginalized by the corporate world. Phil Rich modified transition with a desire to avoid “corporate bullshit.” Katherine Wells vowed never to return to the corporate world. These seem to be the type of role adaptations that occur with all role identities and that are theorized with the role-making construct.

Other forms of role-modification also emerged in my analysis of the transition role. Lingering identity effects (Reitzes and Mutran 2006) and self-motives (Cast and Burke 2002; Gecas 1986; Rosenberg et al. 1997) also surfaced as having an effect on transition role acquisition. Along with role-making, lingering identity effects and self-motives are depicted in Figure 7.1 as particularly pertinent ways in which agency may contribute to shaping transition role identities. However, I argue that both lingering identities and self-motives have a strong structural component as well.

### ***Lingering Identity Effects***

Research on lingering identities suggests that past roles may influence current roles (Reitzes and Mutran 2006). For example, perceived successes in a previous work role could have a positive effect on a current work role. Lingering identities can impact current transition role identities in three ways, due to effects from previous non-work role identities, from previous work role identities, or from previous transition role identities.

A common non-work role influence on transition role identities among participants involved those who had attended highly rated schools. The effect was particularly noticeable with those who had a degree from a top ten university. Harvard, MIT/Sloan, Penn/Wharton, and Stanford were represented by seven participants who had attended top ten schools (U.S. News and World Report 2009). These participants seemed to have particularly high levels of confidence, to have extensive networks, and to have positive work experiences to draw upon in

their work transitions. It's possible that some of this effect was due to lingering identities from work experiences that were enabled by their education or that the qualities that allowed them to be accepted by these top universities were also useful qualities for negotiating transition. However, these participants did not necessarily have the most successful careers, but they seemed to be among the most self-assured in their transition role identities. It should be noted that success in transition is not always about finding a job quickly; it can also be about maintaining one's identity over time. If viewed as analogous to a track event, it can be as much an endurance event as a speed event.

Terri Downs, a 48 year-old middle-manager with an entertainment company, graduated with a Master's degree from MIT's Sloan School of Business. She had always been successful in her career, but she had been in two protracted job transitions. The first time she had a specific geographical area where she wanted to locate. The second time she was intent on finding a position that had the potential to advance her career. The second time, it took two years in a full-time job-search to reach her goal. Her past accomplishments, including her Sloan experience, which is evident from the deep meanings that she associates with Sloan, however, provided the confidence to "stay the course" and hold to her goals.

Participants who were successful in their careers, in their work roles, also seemed to have an advantage in transition. In part, this may be due to the structural differences between career-tracks that I have outlined. However, I did not equate success solely with level of achievement in my analysis. For example, Nick Prine, a former individual contributor who now operates his own small business was one of the most successful participants in my study in terms of achieving his goals. He attached great meaning to a leadership experience that he had in his previous job as a packaging engineer in which he was selected by his peers to lead an intra-corporate group of

packaging engineers from each plant location in his worldwide company. He noted this experience as a factor that has contributed to his current success.

Among the CXO's, Hans Stuart was on-track to someday advance to a CEO position. He was one step away when he unexpectedly lost his job in a merger related power struggle. He believed in his abilities. He believed in his dream. He had made significant sacrifices and was not about to abandon his long-term objective. Hans's doggedness in transition was, at least in part, a product of the lingering identity that developed from his previous accomplishments in his work role.

On the other hand, Frank Grant, a technical writer who worked primarily on a contract basis had never been particularly successful. His primary goal was to land a "permanent" job with a major telecomm company where he was contracting. When he was downsized, the lingering identities from previous work roles that infiltrated his transition role identity were generally pessimistic. His past work experiences certainly had a negative impact on his outlook and seemed to negatively influence his transition role identity, suggesting that lingering identities can be negative, as well as positive influences.

Workers who have previously been in transition also have lingering identities that affect their current transition experience. There seem to be two aspects involved. First, workers who have been in a transition role previously are influenced by their experience in that role when they once again are in transition. A positive experience in transition earlier in a worker's career can inculcate their current transition role identity with confidence. Self-expectations, and the expectations of significant others familiar with the previous situation, contribute to a role identity that has qualities commensurate with the anticipation of a successful outcome.

Phil Rich lost his job in a mid-career downsizing from a major food products corporation. It was his first experience with being in transition. He took his job-search very seriously, right down to the often scoffed at outplacement advice to carry a resume with you everywhere that you go. Coincidentally, he found himself at the funeral of an acquaintance of his wife's that he did not know. He migrated to a row in the back where he met some other people who also did not know the deceased well. They had hired the dead man for a major project that was scheduled to start the following Monday. Phil inquired conversationally about the project, learned that his skills matched the requirements of the job, and pulled out his resume from his jacket right there in the funeral home. He got the job, partly because of his skill-set and partly because the job was a supplier to his former company. He learned what he felt was an important lesson in that he had value not only for his capabilities, but also for his familiarity with a company and an industry. He could find work involving both the supply and the demand side of the economic equation. He realized that he should not underestimate his value.

Phil has been in transition three additional times since then, each time beyond the age of forty. He tends to view transition as an opportunity. He creatively seeks new ways to leverage his work experience and he has been quite successful in doing so. His transition role identity is instilled with the sense that transition is a challenge, a problem to be solved that can lead to interesting and rewarding new opportunities. His first transition experience bordered on the absurd, but it seems to have created a lingering identity that has influenced future work transitions. Lingering identities from each transition experience invested his next transition role with something that approximates a sense of adventure.

Second, workers who have been in transition multiple times may bring a skill component to the transition role acquisition process. Stated differently, workers who are in transition for the



first time may be at a disadvantage because of a lack of ability in the role. In the case of boomers, those in transition for the first time are experiencing transition relatively late in their career, implying a relatively stable career over a long period of time. A worker that has a long career with one company is one instance of this situation. A worker who is downsized at the age of 52 could have a thirty-year career with one company. He or she would have no experience in the transition role. They are not likely to know how to conduct a job-search. They may not have an active network outside of their company contacts. They can be ill prepared for the realities of the 21<sup>st</sup> century labor market.

I suggest, then, that workers skilled at being in transition have an advantage in navigating the restructured economy and that this advantage stems from lingering identities from previous transition roles. Their lingering identities may influence a current transition role either positively or negatively depending on their past experiences. Examples of both positive and negative lingering identities emerged during my study, however, there seemed to be some evidence, although inconclusive, that multiple transitions resulted in workers who became more successful at going through transition (i.e., they negotiated transition better).

Andy Berry's first experience with transition came, after 25 years with two companies, at the age of 47. Since that time he has been in transition seven times over 16 years. His average tenure over his last seven jobs is less than 18 months. Over the last 16 years he has been in transition approximately 35 percent of the time. Andy has developed job-hunting skills and an attitude that he can find a job. Unfortunately, he has not been successful in keeping jobs, perhaps in part due to negative lingering identities from previous work experiences.

Lingering identities, then, can influence transition role identities either positively or negatively. The typical effect for boomer professionals is positive, which is attributable to the

favorable career-growth conditions that they experienced early in their careers. They entered situations in which success was the norm.

Differentiating lingering identities as having either a structural or agentive influence on transition role identities is not always straightforward. The success that boomers have had by being in demand in an expanding economy is structural and the resulting lingering effects from occupying those roles can be labeled as structural. Terri Downs' and Hans Stuart's dogged determination in transition can be partially attributed to structure associated with Terri's top-rated university and Hans' previous career success, but, in both cases, there seemed to also be an agentive component in which their determination stems from their ability to infuse their transition role identities with self-motives.

### ***Self-Motives***

Research has shown that individuals infuse their roles with self-motives (Cast and Burke 2002; Gecas 1986; Rosenberg et al. 1997). Self-esteem and the motivation to enhance it, self-efficacy and the desire to attain it, and authenticity, and the wish to achieve it, are the three self-motives that have been most often studied (Reitzes and Mutran 2002). Typically, self-motives have been viewed as role investments by which individual agency can be introduced to a role. I take a somewhat broader perspective that also considers self-motives as part of the role acquisition process that may be either the product of agency or structure.

My interviews suggested that many of the participants viewed themselves as having substantial self-esteem in spite of being out of work or in transition. They considered self-esteem an important self-meaning. They provided narratives of behavior that was indicative of high self-esteem. They seemed to have purposively infused their transition role identities with self-esteem. Yet, the development or enhancement of self-esteem would not seem to be an anticipated

product of being in transition. Self-esteem cannot be generated out of thin air. It is not the result of being an actor in a situation that does not match one's identity standard, which transition is by definition. How boomer professionals develop or maintain their self-esteem (and other self-motives) during transition is one of the primary themes that emerged from my analysis.

A key observation is that those boomer professionals exhibiting high self-esteem during transition begin the process with a self-esteem reserve that they successfully transfer to the transition role during the acquisition of the role identity. Cast and Burke (2002) posit that self-esteem is an outcome of self-verification that, analogous to energy, can be stored and held in reserve for situations where self-verification is disrupted (Thoits 2003). Stets and Cast (2007) extend the idea of resources (e.g., self-efficacy and self-worth) facilitating self-verification. I address self-motives and identity verification in more detail in the next chapter. At this point, I restrict the discussion to role acquisition.

There was significant variability in the degree of self-esteem, as well as self-efficacy and authenticity, which participants demonstrate. Because these self-motives did not originate within the transition role, but from other roles, present or past, the transfer of self-motives to the transition role must be crucial to the process of infusing transition role identities with self-motives. The variability might occur along two dimensions. The amount of self-esteem (or other self-motive) that the worker has built up in other roles and is available to buffer the worker's overall identity from the transition role identity is one dimension (Cast and Burke 2002). The efficiency with which the built-up self-esteem can be brought to the transition role identity is a second dimension.

For example, many boomer professionals have built substantial self-esteem during the work roles that they have occupied during their career. When they enter transition they have a

surplus of these self-motives to draw on as they enter transition. Other workers, however, have much less self-esteem in reserve. Perhaps they have built less self-esteem over their career. Perhaps their previous work role has been unrewarding or distressing, depleting their self-esteem. These workers have less self-esteem to bring to their transition role identity. Thus, there is variability along the dimension of the amount of self-esteem that is initially available for transition.

Continuing the example, one worker may have issues in other roles that also draw on their self-esteem reserves. A strained marriage, for example, would leave a smaller proportion of self-esteem available to one worker's transition identity while another worker in a happy marriage would have a higher proportion available for transition. Similarly, those workers with the most financial security would likely have the highest proportion of self-esteem to bring to his or her transition role identity.

Role acquisition, then, has another major component, shown in Figure 6.1, in the amount of self-motives, such as self-esteem reserves, that are available when one finds himself or herself in the transition role. Once in the transition role, the rate at which self-esteem is used during transition may vary by the salience or centrality that work holds in their identity hierarchy (Rosenberg 1979; Stryker and Serpe 1994; Reitzes and Mutran 2002). Commitment to the work role may also affect the rate at which self-esteem is depleted during transition (Burke and Reitzes 1991). Perceived progress in moving out of transition will also affect self-esteem.

Self-efficacy operates similarly, although efficacy would seem to be less transferrable from one role to another. A reserve of self-efficacy as a worker would have some bearing on self-efficacy in transition, but self-efficacy as a parent would have little bearing on the transition

role. Still, a sense of self-efficacy that can be infused into the transition role seems to have a significant impact on transition role identities.

Authenticity has much in common with the other two self-motives, but also involves important differences for boomer professionals. Self-esteem and self-efficacy are vulnerable to age. For example, a computer programmer loses some of these self-motives in a profession increasingly dominated by younger workers, particularly when he senses that he is not able to write or debug code as fast as he once could. On the other hand, the search for authenticity, the need to be true to oneself, seems to become more prominent with age (George 1998). Most of the participants in my study mentioned a desire for meaning in their work that I equated with infusing their roles with authenticity.

Like self-esteem and self-efficacy, authenticity had a major influence on transition role identities. A worker who felt he or she had important self-values guiding their transition was better positioned in the transition role. The importance of self-motives was an over-arching theme in my research. Self-motives seem to be the most important determinant of self-meanings in the transition role. I will expand on these findings in the next chapter.

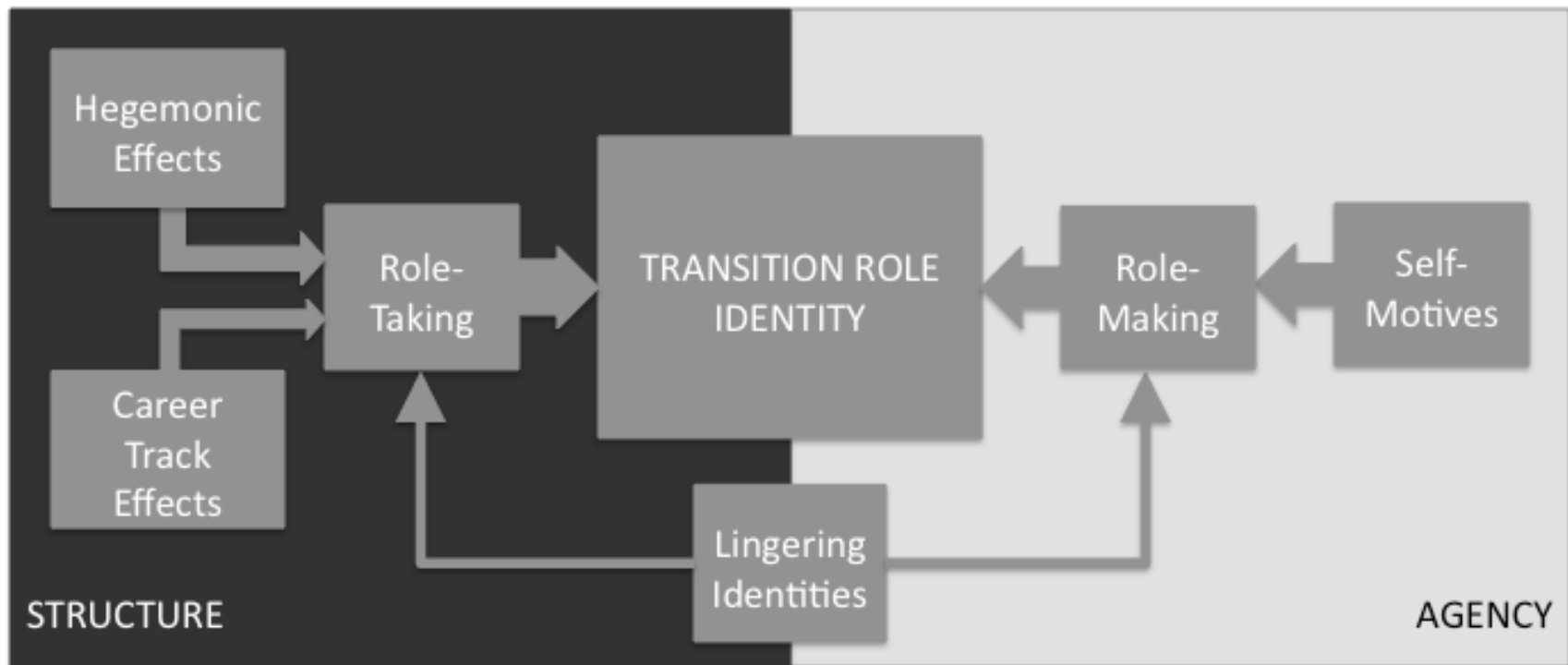
Similar to lingering identities, the origin of self-motives in terms of structure and agency is quite fluid. Although self-motives are generally considered an agentive process, I suggest that structure plays an important part in the availability and infusion of self-motives into worker's role identities. Self-esteem has structural roots in the early career success that boomer professionals, and perhaps other groups of workers, have experienced. Self-efficacy is an outgrowth of expectations that boomer professionals behave proactively. Authenticity is based on structural effects that boomer professionals share. In other words, boomer professionals' self-motives derive, at least in part, from effects that are predominantly structural.

However, there is certainly considerable variation among participants in the “amount” of self-esteem, self-efficacy, and authenticity that they exhibit. Agency seems a valid explanation for a significant part of this variation. Some workers are simply more self-efficacious, for example. They seem to be more effective or more efficient in developing a sense of self-efficacy and in putting it into action. Self-efficacy has significant meaning and, as such, is a key element in their identity standard. Therefore, I consider self-motives to have both structural and agentive components. Sources of self-motives are crucial to understanding transition role identities because it is not a role that provides a clear means of generating self-esteem, self-efficacy, or authenticity. Workers in transition are by definition in situations which are incongruous with their identity standards. Rather than being able to infuse their identity with self-motives during transition, they are more likely to deplete their reserves of self-motives, a conclusion that is important as I examine identity maintenance in the next chapter.

## **Summary**

In this chapter, I have established a theoretical argument for conceptualizing transition as a relatively new work-related role. I have examined in detail how transition role identities are acquired and, in doing so, have determined that the first two criteria for adopting this perspective have been met. I have investigated structure, in the form of hegemonic effects and career-track effects, that is particularly influential in transition role identity formation. I have considered structural role-taking and agentive role-making as key role acquisition processes. And, I have examined secondary processes, lingering identities and self-motives, that are relevant to the formation of transition role identities, including an assessment of the relative parts that structure and agency play in these processes.

Once the role occupant has acquired the transition role identity, the emphasis shifts to maintaining the role identity. This is accomplished with the self-verification process (Burke 1991; Stets 2006). If verification is achieved through perceptions of in-role behavior, the role identity is maintained. If in-role behavior fails over time to verify the transitional worker's identity, then the identity is modified or abandoned. This process is crucial in determining the outcomes of the transition role. In the next chapter I investigate how transition role identities are maintained and examine the consequences when role occupants fail to self-verify in these roles.



**Figure 7.1. Transition Role Identity Acquisition and Development**



## **CHAPTER 8 – ROLE MAINTENANCE**

Reflected appraisals derive from the person's perceptions of themselves and how others view them within situations or interactions. In general, people have a strong desire to maintain their self-meanings and endeavor to confirm their own perceptions of themselves. Self-verification is achieved when these perceived self-meanings, one's internal identity standard, align with reflected appraisals, their perceptions of how they are viewed by others (Burke and Reitzes 1991; Jaret, Reitzes, and Shapkina 2005; Stets and Cast 2007). Congruity in the self verification process is required to successfully maintain one's identity. In this chapter, I examine this process for the specific case of identity maintenance in the transition role.

The nature of transition suggests that workers are in situations where they cannot achieve self-verification. Typically being out of work is incongruous with workers', especially boomer professionals', identity standard. Transitional work situations involve being unemployed and in search of a job, out of work and preparing to start a business, or determining that a career needs to be reinvented. In each of these situations incongruity exists between a worker's actual state and their desired state. Self-verification with their overall identity standard is impossible and identity maintenance is disrupted.

In transition, the work role has been terminated, a role that for boomer professionals typically occupies high status in identity salience and centrality hierarchies. The sense of self that the former job provided is reduced to whatever lingering identity remains. The old identity standard no longer applies (Burke 1991). To the extent that self-esteem was derived from work, that source has been eliminated. A sense of self-efficacy provided by ones' work no longer is available. Feelings of authenticity that may have resulted from work no longer exist. The only

means of restoring one's identity involves exiting the former work role, entering a transition role, and then successfully exiting the transition role.

Participants' role-exit from their former work role was usually of short duration. Nora Reese suggested that, "You've got to get through your mourning stage in about two weeks, that's about all you can do." A few days were typical as boomer professionals quickly moved into transition. During this role-exit, the former work role is replaced by the transition role in the worker's identity structure.

Within the transition role, however, workers are attempting to verify with a different identity standard. This new identity standard involves self-meanings associated with the transition role identity as derived from the role acquisition processes discussed earlier. For example, a worker could be extremely distressed by being out of work, but satisfied with the steps that they are taking in their job-search. They may feel a sense of self-esteem and view themselves as being self-efficacious in managing transition even though they find being out of work stressful. In this example, the worker cannot self-verify in their previous work role identity, but can self-verify in his or her transition role identity. This is an important distinction in examining the effects of transition on worker identities. The transition role cannot substitute for the work role. It cannot provide the same sense of self and undoubtedly distress results. However, the transition role provides a path to a reestablished identity; the transition role identity must be negotiated. Bridging to a full sense of self requires maintaining one's identity with the transition role at least temporarily given a high level of importance in the hierarchy of role identities. For some period of time, a transition role identity must be successfully maintained. The process is generally stressful. The extent of distress during transition varies, in part, according to how successfully verification of the transition role identity is achieved.

The key to understanding outcomes of transition is through an understanding of transition role identities. I extend this theoretical argument below, suggesting that achieving self-verification in the transition role better positions the worker to attain their objectives beyond transition. I examine the processes involved and the mechanisms that contribute to varying degrees of self-verification of the transition role identity and discuss the implications.

## **Resources**

Stets and Cast (2007) introduce the idea of resources—anything consensually valued in our society—within an identity theory framework. They propose that the availability of resources facilitates self-verification and that achieving self-verification increases resource levels. They also suggest that these resources can be stored, as in a reservoir, and can flow, or be transferred, over time, within situations, and across situations. The idea of transferable resources can be conceptualized as occurring between role identities because different role identities are invoked within and across situations. Resources, then, can be envisioned as a reserve that are used to facilitate self-verification, are replenished when self-verification is achieved, and can flow between role identities to accomplish self-goals, including self-verification. There are three types of resources: structural, interpersonal, and personal.

### ***Structural Resources***

Structural resources involve tangible human capital such as education, income and wealth, and occupation (Stets and Cast 2007). Workers either have or do not have these assets when they are in transition. For most role identities, one's occupation is a significant resource to draw upon in maintaining one's identity and sense of self. This particular structural resource is, of course, not available to those in transition role identities because they do not have a job within their occupation and resources that derive from one's occupation are interrupted.

Many boomer professionals have substantial structural resources. Somewhat surprisingly, the most common structural resource, wealth, did not seem to have the positive impact on transition that I expected. Several participants had sufficient wealth that having to work was not an absolute requirement. For example, Wes Young had joined an Internet provider early in the dot.com era. He became an officer of the company with stock options that made him very wealthy when the company was acquired (before the dot.com bubble burst). He is currently working for a small high-tech business incubator advising start-up companies, but his real ambitions involve a start-up of his own. Until he is ready to pursue his own company, he plans to continue working in his current job. His wealth is not a particularly relevant determinant of his behavior or his career outcomes. His actions seem much more dependent on the self-esteem, self-efficacy, and authenticity that he derives from his work.

Several other participants “did not need to work” financially, but all were participating or seeking some type of work. A lack of wealth was certainly a significant motivator for many of the participants, but again did not seem to be a primary determinant of behavior or outcomes. Drew Frye was one of the participants most in need of income, but his need did not consistently drive his behavior. He worked for a while as a door-to-door salesperson making not much more than minimum wage. Now in transition, after losing that job, he admitted that he spends some days playing solitaire. Wes Young and Drew Frye’s narratives lead me to conclude that wealth is not a primary factor in transition identity maintenance. Wealthy workers who are forced into transition seem to exhibit as much desire to resolve their work situation as other boomer professionals who are not as wealthy. For boomer professionals, the issue is often not financially immediate; the risks of transition are more related to the sense of self than to where their next

meal is coming from. In this regard, boomer professionals likely differ from other strata of the workforce (Kaufman 1982; Perrucci and Wysong 1999).

I did find some relationship between identity maintenance and education. Those who attended the best schools seemed to have more confidence in transition, even though where someone went to college probably has little bearing on transition outcomes for workers of boomer age. Education has little leverage to distinguish one boomer professional from another because all are educated. Most have college degrees and MBA's are common. Having graduated from a highly ranked university has diminishing value in the labor market for workers of baby boomer age because of the time that has typically passed since they received their degree. Education, in and of itself, is of little direct value as a resource in maintaining a transition role identity. However, the relationship with identity maintenance may have more to do with social capital and the sense of self-esteem and self-efficacy that comes from having valuable networks. It also may relate to lingering identities from past student roles that carry significant self-meaning for those who attended universities that are considered among the best (see Chapter 7). I do not examine structural resources any further, but instead focus on personal resources as being more explanatory of boomer professional identities, behavior, and outcomes.

### ***Interpersonal Resources***

Stets and Cast (2007: 521) define interpersonal resources as "processes that arise out of relationships." Interpersonal resources, or more appropriately indicators of interpersonal resources, did not emerge in my analysis. In some ways this is surprising in that the support of a loved one during transition is likely an asset and interpersonal resources are necessary to have developed a relationship that provides such support. This may be an additional attribute of boomer professionals in that significant others (friends, family, etc.) are often educated and

versed in the demands of maintaining a career in the restructured economy. Support may be assumed.

Further, interpersonal resources are not a tremendous advantage in negotiating transition. The outcomes of transition, finding a job, deciding to start a business, or positioning to reinvent a career, are not particularly dependent on relationship building. These resources become very important once transition is exited, but are of little value during transition and in maintaining the transition role identity.

### ***Personal Resources***

I found personal resources in the form of self-esteem, self-efficacy, and authenticity to be particularly relevant to participants' transition role identities. Thoits (2003) suggests, "The more individuals possess personal resources such as self-efficacy and self-worth, the more they are effective in pursuing their goals" (Stets and Cast 2007: 520). Similarly, Cast and Burke (2002) conceptualize self-esteem as analogous to being retained in a reservoir that is drained when self-verification fails and is raised when self-verification is achieved. Stets and Cast (2007: 520) classify these self-motives as personal resources, involving "beliefs about the self along such dimensions as being authentic, worthwhile, and competent."

When self-verification occurs, individuals have a sense of well-being. They are highly motivated to achieve verification. Their behavior is validated. Personal resources are not reduced and they may be increased. A person who self-verifies is likely to have higher self-esteem as a result. Depending on the circumstances they may also have an increased sense of self-efficacy. Similarly, in some situations, a feeling of authenticity may also be reinforced. The net effect is generally one of identity maintenance.

Personal resources vary in relationship to the achievement of self-verification and can be shifted between role identities. When one role identity is maintained a surplus of personal resources are available to other role identities that may have issues with self-verification. For example, an out of work mother who is able to spend more time with her children generates personal resources from her parent role identity that can help sustain her transition role identity as difficulties are encountered in finding a job. If her job search is going well and she self-verifies in her transition role identity, a surplus of personal resources are created that can be used at a later time. This conception of personal resources, in particular, has significant explanatory power in understanding the importance of self-motives in maintaining identities and attaining positive transition outcomes.

Amy Gliss offered an account that demonstrated the transfer of resources between role identities. She had triplets at a time when she was in a very high pressure position with her company. She recalled that, “It was pretty stressful after the children were born. To fit everything in, be a good mom – I had a lot of issues around that, because there’s just not enough time in the day to do everything that you want, especially when you have three little kids.” Nonetheless, she enjoyed her work and derived a great deal of satisfaction from her accomplishments. Presumably, she was able to transfer personal resources generated from her work successes to help sustain her role as a mother, which was compromised by a lack of time.

Now, approximately 11 years later, she was out of work and enjoying life for the moment as a stay-at-home mom. She’s not sure it’s a long term situation, but she declared, “I’m not planning on getting a nanny. It’s an evaluative period. I’m just trying to figure out what do I need and what do the kids need, and then I’ll figure out a job from there, but the basis will be what’s

best for the family.” Today, personal resources that derived from her role as a mother are helping to maintain her identity while being out of work.

Marie Pierce grew up with family issues. Her father was ill and her mother had to leave her to be raised by relatives. Her uncle, who was instrumental in raising her and with whom she was very close, then died when she was seven. She had reflected on the relationship between work and family in her life, and noted, “The activity of work a lot of times compensated for my emotional well being, because it was something that I could do and excel in, but there was always sort of this longing for family.” Later, as a successful executive, she was faced with a difficult divorce that caused her to be separated from her daughter. Her family role was extremely stressful, but she was very successful in her job. She was able to draw on her work accomplishments, particularly her self-efficacy, to get through her family issues. Whereas many workers in transition drew on their reserves of personal resources when they are unemployed, Marie seemed to reverse this process, using work role reserves to sustain her family role.

When self-verification is not achieved, the individual experiences distress. It may be in the form of anxiety or depression or manifest itself in other ways. I will examine stress as an outcome of not achieving self-verification shortly. Failed verification draws on personal resources as the individual addresses the disruption, resulting in a decrease in available resources. The person will attempt to change his or her situation to bring their reflected appraisal in line with their identity standards to achieve self-verification. Alternatively, they may change their behavior in an effort to self-verify. If self-verification does not occur over the long-term, personal resources become depleted; behavior may be altered to the point where identity—the sense of self—is lost. The consequences of ongoing distress can be severe. Consequently, being



able to maintain one's identity during transition, to self-verify within the transition role identity, is crucial for a worker in transition.

### **Transition Identity Maintenance and Transition Role-Exits**

Of the participants, twenty were currently in transition and seven had recently been in transition (see Table 4.1).<sup>13</sup> The additional six participants had been in transition after the age of forty, but some time ago. I considered all of those who had exited transition to have done so successfully.<sup>14</sup> They were well into their new jobs, business ownership or career reinventions. Each of these seven participants thought of their transition in positive terms. Only five of those in transition had a negative outlook toward the future. The remaining 22 participants currently or recently in transition had positive outlooks or experiences.

Respondents who were in transition varied in the length of time they had been out of work or underemployed, leading me to expect more negativity among the longer-term transitioners. The overwhelming sense from these narratives of being in transition, however, is that boomer professionals respond positively to the transition role. Their attitudes generally remain optimistic in the face of adversity. They do not blame the economy and they do not blame ageism. They view transition, consistent with their perspective on age and the restructured economy, as a situation to be managed. They expect favorable outcomes and they generally plan to do whatever it takes to achieve such outcomes.

After conducting the interviews, I was quite surprised. I had expected stories of marginalization and struggles to overcome it. I had expected discouragement and not knowing

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<sup>13</sup> I consider participants who are both unemployed and underemployed to be in transition.

<sup>14</sup> Wes Young was employed in a good job, although not at a level equal to his previous accomplishments as an officer of the company in a very successful high-tech start-up. His longer-term aspirations were to begin a start-up of his own, but he was satisfied for the time being working with other high-tech start-ups in an advisory capacity. I considered his a successful transition even though he was technically underemployed compared to his previous achievements.

where to turn. I had expected structural constraints that were insurmountable. I heard some of these things, but far less than I expected. My initial, somewhat superficial, deduction was that boomer professionals were interjecting substantial willpower to their transitional experiences, possibly masking the marginalization that I expected to find. This became a sensitizing concept that I brought to my analysis. I wondered whether the data would help explain such proactive role identity processes.

Of course there were some negative outcomes. Five of the participants were very discouraged, perhaps even defeated in some cases. Three seemed in danger of withdrawing from the labor market altogether. These few workers with seemingly similar structural effects, with histories of career accomplishments, and with apparent access to similar resources had such profoundly opposing outcomes. I hoped to develop theory from my analysis that would explain the disparate outcomes as well as the tendency toward positive outcomes. Toward this end, I spend the remainder of this chapter describing the theory that emerged from my analysis relative to transition role identity maintenance and transition role-exits.

Transition is a particularly urgent role identity that likely differs in intensity and duration from other role identities. It is generally not a chosen role identity, but one that is imposed upon the role occupant by circumstances beyond their control. Upon entering the role, the overriding objective is to exit the role. As such, the role commands a priority on the availability of personal resources that the role occupant can access to maintain the identity while trying to achieve a positive end to the identity. The identity cannot be positively ended without maintaining the identity. Personal resources are crucial. A loss of self-efficacy, for example, can lead to an inability to maintain a positive transition role identity and render the worker unable to take the steps necessary to end transition and move on to a longer-term, more stable worker identity. The

implications for the entire sense of self are significant due to the centrality of the worker role for most workers and the relative importance that work holds in U.S. culture.

The transition role identity also differs from other role identities in terms of the reliance on personal resources to maintain the role identity. Most roles involve structural resources and interpersonal resources as well as personal resources. There is much more breadth, and perhaps more balance afforded the role occupant of other, more traditional role identities.

Transition as a role identity, then, represents a specific instance of role identity maintenance that involves unique circumstances. As a result, it may not be generalizable to other role identities and in some respects it represents a simplification of other role identities. However, because they unfold over such a short period of time and seem to depend on a less complex mix of resources than other roles, transition role identities provide an interesting opportunity for identity theory research.

### ***Role Development***

Figure 8.1 shows the process of identity maintenance in the transition role that emerged from participants' narratives of transition meanings and experience. I describe this figure in depth in the following sections, focusing on role development as the starting point of the process, then discussing how the role identity is maintained by means of an identity control theory control system dependent on personal resources, and then outline the positive and negative ways that the role can be exited.

The formation of the transition role identity is described in detail in the previous chapter. There, I was primarily interested in addressing the structure that appeared to be the most influential on boomer professionals. Hegemonic effects and career track effects were given particular attention because of the meaning that they held for participants. These effects were

then shown prominently in depicting the acquisition of transition role identities in Figure 7.1. Here, because of the importance of personal resources in identity maintenance, I focus on the initial infusion of personal resources and self-motives during role acquisition as shown in Figure 8.1.

One might infer that I am suggesting that hegemonic effects, for example, are more important in role acquisition and personal resources are more important in identity maintenance. More accurately, however, I am proposing that the dimension of a given hegemonic effect that generates personal resources is more relevant to identity maintenance. For example, proactive behavior is a structural effect in the sense that boomer professionals hold social and individual expectations that they be self-efficacious. Proactive behavior, then, is a form of structure that generates personal resources in the form of self-efficacy and, reciprocally, self-efficacy is a personal resource that derives from proactive behavior as a form of social structure. Extending the example, structural authenticity clearly is a source of authenticity as a personal resource. Youthful age identities are somewhat more complex, but the same idea holds true. Youthful age identities are structural in the sense that they represent an underlying social pattern among boomer professionals. Youthful age identity includes a dimension that provides a sense of self-efficacy and, as a result is a source of personal resources. Youthful age identity may also include dimensions of self-esteem and authenticity, but the important point is that personal resources can originate with social structure.

As a more specific example, Tony Vaughn shaved his moustache for his job interviews because he thought that he looked younger without it. He liked his moustache and probably would not have shaved it had he not been in transition. He did not shave as an act of agency, but because of social structure associated with youthful age identities. He felt a sense of self-efficacy

by doing something that he thought was a positive step in his transition role. Arguably, he increased his personal resources by shaving his moustache even though he did not really want to shave it. He derived personal resources that originated with social structure. In different circumstances, outside of the transition role, shaving to look younger might have been an agentic result of self-motives aimed at self-enhancement.

Personal resources of interest, based on participant narratives, are self-esteem, self-efficacy, and authenticity. These resources originate from hegemonic effects, as discussed, but also from role-taking, from lingering identities, and with successful self-verification within other role identities (see Figure 7.1). For example, awareness that resume writing is a skill required of those in transition becomes part of transition role identities through role-taking. A worker that perceives herself to have resume writing skills might derive a sense of self-efficacy from this structural aspect of role-taking. Structure plays a major part in the level of these personal resources as behavior that generates these resources is expected of and encouraged from boomer professionals.

Self-esteem, self-efficacy, and authenticity are often thought by scholars as agentic because individuals strive to invest their roles with these resources as a means of identity protection and enhancement. However, the view here is that these resources develop primarily from structural processes. Nonetheless, individual agency can also contribute to the levels of personal resources that workers bring to their transition role identity. For example, some workers instill their role with self-esteem of their own volition. They may leverage existing self-esteem into perceptions of higher-levels of self-esteem, or be particularly effective at applying the self-esteem that they have. Self-esteem may be particularly relevant to their self-meanings. These aspects of self-esteem I attribute to agency. Self-efficacy operates very much like self-esteem in

that some workers seem to express individuality through their use of self-efficacy. Authenticity can be particularly agentive. For example, religion and spirituality are significant sources of authenticity, which participants draw upon in coping with transition.

Several participants indicated strong beliefs with which they infuse their role identity during transition. Fran Kline declared, “I don’t believe in luck, I don’t believe in serendipity, I believe in providence and I have extremely strong faith. I just have every confidence that this is where I’m supposed to be, and so whatever happens it’s gonna turn out ok.” Joan Bell stated, “I just know spirits are out there working with me and, you know, will present some options to me, and, you know, we’ll see what comes up.” Marie Pierce mused about her spirituality, “That’s the really wonderful thing is that my life and the way that I’ve created my life is that it moves and flows...you could say that everything up to this point in time has led me right there.”

Earl Birch recounted the role his faith plays, not only in transition, but in his work as well:

Yes, yes, I mean my faith has definitely been very instrumental and who I’ve become, I mean I’ve been a Christian since 1986, but I feel that 1996 was when I really started to figure out that I really needed to live it out in a meaningful, deep, intimate way and you know, I’ve been on a quest ever since then to understand what that means and, you know, a lot of changes have come as a result of that. My identity has changed, the-my understanding of integrity has changed, my understanding of accountability has changed, just a lot of different things. The interaction between me and the leadership and how I should honor my leadership regardless of whether I agree or all of those things are directly related to my faith and the things that I believe, that I read when I read the Bible.

For purposes of conceptualizing how initial reserves originate during development of transition role identities, I figuratively show two different sources in Figure 8.1, personal resources and self-motives. Personal resources represent self-esteem, self-efficacy, and authenticity derived from primarily structural sources while self-motives represent the more traditional view of self-esteem, self-efficacy, and authenticity as primarily agentive. I illustrate a

reservoir of personal resources and self-motives that I label simply as a “Personal Resources Reserve.”

### ***Role Identity Maintenance***

Continuing with Figure 8.1, the acquired transition role identity must be maintained in order to successfully negotiate transition. Identity maintenance is shown in the process as having an associated personal resources reserve and identity standard. The identity standard is compared to reflected appraisals and the level of personal resources is raised when they are congruous (i.e., self-verification is achieved) and lowered when they are incongruous. Changing the level of the personal resources reserve is depicted with a plus sign or a minus sign.

Self-verification creates additional personal resources when self-meanings are successfully verified. Achieving verification provides positive feelings that create a sense of self-esteem. Interactions that validate self-meaning make a person feel self-efficacious. Congruity between self-meanings and reflected appraisals provide a sense of authenticity. Personal resource reserves, then, are increased through the attainment of self-verification (Stets and Cast 2007).

Transition, however, is a disruptive process. Many of the interactions that take place are, in all probability, going to result in unfavorable outcomes. For example, resumes are going to be rejected and interviews are likely to result in rejection. Reality, on average, is not going to match a worker’s overall goals while he or she is in transition (i.e., a worker is going to be unemployed or underemployed throughout transition).

Self-verification in transition, though, involves achieving a sense that one’s behavior in interactions is aligned with one’s identity standard for transitional activities. That is, a sense that one is doing things to be successful in transition is reflected in appraisals related to transitional activities. For example, an identity standard containing self-meanings that one is good at

networking, when verified in reflected appraisals that indicate that one is good at networking, self-verification results. Identity maintenance of the transition role identity, then, consists of successfully verifying behavior that creates the conditions to achieve a positive outcome from transition.

Achieving verification through relatively minor accomplishments can be extremely important. These actions allow the worker to feel that they are performing transition in accordance with how they believe that transition should be approached (i.e., in conformance with their transition role identity standard). Successful verification in transition helps to provide, or replenish, the personal resources required to withstand the larger disruption to one's identity that results from being in transition. It allows the worker to cope with the daily disruptions associated with transition.

The more reserves of personal resources that a worker has, or the more successfully they can generate new personal resources, or the more that they are able to leverage existing personal resources, then the better they are positioned to successfully get through transition. This idea is illustrated simplistically on the left-hand side of figure 8.1 where self-verification in transition leads to positive overall outcomes.

Most of the participants were very good at “doing the little things.” Nora Reese made a virtual science of her networking. She logged every contact that she made in a spreadsheet and categorized each contact as being employed or unemployed. She measured her progress regularly against an objective of doing 70 percent of her networking with employed persons. She reported her results to her outplacement advisor, who provided positive feedback. This relatively minor task helped her to achieve self-verification within her transition role identity. She attached meaning to these actions, they were important to organizing her activities and she had a very



positive outlook as a result. She seemed to be successfully leveraging the personal resources that she generated from achieving self-verification.

Figure 8.1 also illustrates the process when identity standards and reflected appraisals are incongruous. If the two do not match, distress results and the worker strives to either change the situation or his or her behavior to try and achieve a match. Personal resources are “consumed” in this part of the process, decreasing the level of resources in reserve. A continual state of failing to achieve self-verification ultimately depletes personal resources leaving the worker with a lack of self-esteem, self-efficacy, and authenticity to maintain their identity. Resource reserves are no longer available to maintain other role identities. At this point, a loss of identity can occur that affects one’s overall sense of self. This is illustrated in Figure 8.1 with the path on the right-hand side of the diagram.

### ***Distress: Anxiety and Depression***

Distress results when the identity maintenance process is interrupted. When reflected appraisals are incongruent with an individual’s identity standard, two results, distress and behavior/situation modification, occur as shown in Figure 8.1. First, “a subjective feeling of distress occurs that increases with the degree of incongruence” (Burke 1991: 838). Second, the individual takes action to try and make their reflected appraisals and identity standard align. They may try and alter the situation or change their behavior in the situation to achieve congruence. Burke (1991: 841-842) describes two situations in which identity theory would predict stress for workers in transition. First, “An individual’s behavior in a situation (environment) may have little or no effect on that situation.” There is no behavior that will restore a lost job and the worker’s previous identity standard is no longer applicable. Reflected appraisals from the job are no longer available no matter what actions are taken. The former

identity can no longer be maintained. Second, “The individual may not be able to perceive (understand) the meanings in the situation (environment), or may perceive them incorrectly.”

This can occur when a worker enters a new role, such as transition, where he or she does not fully understand the expectations. Identity theory, then, predicts considerable distress associated with transition.

Distress was certainly a significant theme among participants. Even though they were generally confident and proactive, they nonetheless experienced substantial distress throughout the transition process. Donna North, a 53 year-old single woman who obtains a primary sense of purpose and fulfillment from work in Human Resources, had been unable to translate her vast experience in organizational development into a job. She acknowledged that “The situation is very stressful...I’m gaining weight from the stress and being overweight is going to make it even more difficult to get hired.” David Driver admitted that, “the thing is that I now am living in this world of constant anxiety” because of the uncertainty of contracting. Rod Steele divulged, “Right now I’m concentrating on not getting depressed. I’m evaluating the data and saying there are not a lot of jobs out there right now...don’t get depressed.” Tom Frost was “just trying to keep my wits about me.” Although it did not always hold the strongest meanings, virtually everyone in the study offered some insight into the stress associated with transition.

Vic White was nearing the end of transition as he has decided to start a company in the solar industry. Asked how he handles the pressure, he disclosed the following:

Well, one is I work my ass off, I’m usually awake by 4:30 in the morning I’m usually never in bed beyond 5:30 in the morning, I’m usually up before then, you know on weekends I’m up at 5:30, I work 12 hours a day during the week and probably another 15 on weekends. I’m pushin’ and pushin’ and ‘pushin, you know, I guess those are the things that I do, I carry a tremendous amount of stress, I’m taking medication for it, but beyond that I’m not sure that there is a hell of a lot I can do.

Fran Kline's internal transition turned into a major life event as her health ultimately failed and she was diagnosed with three chronic, life-altering diseases. She recounted the experience as follows:

Word came out that they were hiring [an outside consultant], and anyone who was working for the firm was gonna have to re-apply for their job, which after twenty something years I just found the height of insult and second of all, what was the other thing? You had to re-apply for your job, and-oh you were gonna be talent matched! Ok, so it wasn't even just-you had to re-apply to stay with the company and then you had to-then they would tell you if you were accepted, what you're job was.

It was kinda like the frog in the saucepan on the stove, which is where, you know, the heat just keeps getting turned up, turned up, turned up and before you know it the frog is boiled but he doesn't know it, because the temperature has been rising slowly.

And I wound up in the back of an ambulance, and spent two months at St. Joe's hospital where they struggled to stabilize me, because my-what I learned was, that type of environment was literally toxic to my system, to my system-my health, but I also learned at that point in a way that I've never really understood before how much your mental well being affects your physical well being.

"Cause I'm laying there in St. Joe's I got stuff hooked up to me all over-I don't even know what half the stuff was and some guy [from work is] screaming at me [on the phone], and the nurse comes in 'cause all the monitors are goin' whacked out and she just grabbed the phone out of my hand and she said 'that's it, that's enough.' She went and got the doctor and it was like, ok this place is killing you."

So when it did end, which was basically a doctor telling me, "one way or the other, you are leaving there, do you understand me? I can either write you a permanent disability notice, or it's gonna kill you. So you pick." I have three incurable...diseases that were all stress triggered and all interrelated that I will carry with me for the rest of my life.

This type of narrative of distress abounded among a group of participants who were markedly self-assured, confident, and proactive, largely with a positive sense of self. They took action as they perceive it as warranted and, for the most part, had a history of successfully bringing situations and their behavior into alignment with their identity. They were optimistic about the future. Yet they experienced considerable distress in transition.

In general, they were familiar with the stresses of work. Stress was not new to them and they expected to, and knew how to, cope. If handling the stress was not a viable option, they

would make changes as necessary. Beth Huff always knew that she would have to leave her marketing career at some point because of the stressful pace. She observed the situation as follows:

I always had kinda in the back of my mind, I don't know how long I really wanna stay in marketing in the corporate world because it...it is kind of a burnout job, it's, you know, it's all consuming in a lot of ways and the other thing to your point of these questions about thinking about a career, I used to joke around and say, "you don't see anybody over 50 in marketing, it's a young people's business because," I said, "they either like have a heart attack and die from the stress or they're gonna be a consultant running their own business," but you don't see very, very many people stay in marketing that are older 'cause they're always marketing to a young group, there's a lot of young energy, a lot of young people there.

Earl Birch changed his work behavior to balance family issues. Early in his career he was very career minded, but it led to role conflict and stress, so he changed his behavior, with some difficulty, to alleviate the incongruous situation. He related the experience as follows:

I would come home [from traveling] for about a week to do laundry and go back, and back then my career was everything and I had this perception that as long as I'm taking care of the family and providing and that you know, she has what she needs to do the things that she wants, like stay at home with the baby and do whatever she wants, buy whatever she wants, you know, she should be happy.

[But I was] still motivated, yah, and so what-it was a struggle for me because I felt in a way that I was sacrificing some of my dreams and ambition for the sake of the family but I knew it was the-I felt like it was the right thing to do and I struggled with how do I do this effectively? It was a very, very difficult time for me emotionally trying to struggle through that, you know, it certainly put a lot of strain on my marriage and it was just somethin' that I had to just keep trying to work through...

...because of all the issues I had, had with family, balance before...so I was trying to maintain a balance and so I got to a place where once I exceeded my quota, I didn't push to become number one just to beat out the other guys. To me my goal was exceed the quota, you know, than you've met your obligation to the company, you've met your obligation to yourself which is to do better than you're supposed to and then now, you know, you don't stop chasing deals but don't go crazy, you know, don't sacrifice family time and other things to go get these deals...Now I've stopped trying to be seen or viewed or recognized or any of those kinds of things and I solely focus on doing the best possible job that I can, period, end of story.

Even those who are educated and experienced with coping with stress are vulnerable when their reflected appraisals do not match their identity standards. Distress, or more accurately failing to self-verify, drains reserves of personal resources as shown in Figure 8.1. However, the same participants that attached meanings to transition associated with stress also attached meanings that indicated positive levels of self-esteem, self-efficacy, and authenticity. In fact, they exuded attributes that logically would be undergirded by substantial personal resources and infusions of self-motives. This apparent contradiction can be explained by the participant's ability to self-verify within their transition role identity. The steps that workers can take to self-verify within their transition role identity can moderate the negative impact somewhat, but it is reasonable to conclude that transition, overall, has a negative net effect on personal resource reserves. Nonetheless, the third requirement for treating transition as a separate role, that role occupants attempt to self-verify against an identity standard in order to maintain the transition role identity, appears to be satisfied.

### ***Loss of Identity***

In the case where reserves of personal resources cannot be maintained and are depleted by an inability to self-verify within the worker role identity and cannot be moderated by self-verifying within the transition role identity, a person's identity as a worker can be lost. Cast and Burke (2002: 1048) suggest that, "When disturbances to self-verification are large, or more persistent, people may extricate themselves from the situation or shed the identity in order to avoid the negative feelings that arise from persistent discrepancies between situational meanings and identity standards."

Identity loss was an atypical outcome in my analysis, but as many as five of the participants exhibited evidence that they were potentially in danger of a loss of identity occurring. Drew Frye had a long career with a large beverage company when he was downsized at age 51. Now 59 and three years removed from meaningful work with his Limited Liability Corporation (LLC), he seemed to be growing desperate. He related his situation as follows:

I mean, you could learn how to Twitter, right? And how to do that type of thing and to have what I accomplished all those years count for something, but I honestly don't know how that's gonna happen, you know, as I tend to get older, ya know, I'm 59 in August practically 60. I dunno, I mean, I go to Kroger's now and I'm looking at the-you know, the cashier jobs, I'm going back to my A&P days, you know, start all over again. And it's not that I want to totally forsake my professional life, for one of manual labor, but there may reach a point where there's not enough money and I can't cancel the paper anymore and there's nothing left to cancel [to help pay the mortgage], you know.

Back in the days when I was at [the beverage company] when I was, just going out of my mind, the pressure, I would always-I was thinking all the time, oh, if I only had the time, you know, to have free time, you know, to do this or that, and write or read or whatever wouldn't that be great? So it was a matter of, be careful what you wish for. And now that I have all this time, I...I'm really not motivated to do anything, I feel like I'm...I'm not really, I don't think depressed, but just very unmotivated, I mean, I've spent whole days playing Solitaire, you know.

So I'm not there yet but I have this sense of-I-it's kinda like jumping from ice flow to ice flow, you know, it's like, ok, I'm safe here for awhile until this flow melts a little bit and I gotta jump over to that one. And you're always looking for that-you're always trying to line the next one up.

Andy Berry missed the fulfillment that working provided and felt a strong sense of loss after seven transitions and then being out of work for a year at the time of the interview. He conveyed the sense of loss as follows:

I miss the challenge, like you say; unless you're out of work you don't have the right perspective. It's a shame that you have this perspective when you are out of work. It would be great if you had this perspective while you were still working. It's hard to anticipate the level of hurt that you go through, self-esteem, worth, all of that when you are out of work. You don't have those obligations, you don't have those challenges, and you don't have those people you work with anymore. I miss the camaraderie, sharing of responsibilities with team members, the other

people working for the company, the phone calls, the immediate emails...it's all gone. So that takes a hit on your self-esteem.

I'd expect transition to be high in his hierarchy of roles, that he would be very actively engaged in his job-search and that he would be doing the things that are expected of someone in transition. Yet Andy was not particularly active in assuming the role of transition even though he clearly wanted a job to bridge him to retirement. He had high commitment in terms of what he forfeited by being unemployed, but low commitment in terms of actual behavior. His actions, in terms of pursuing a job, were not commensurate with the loss he felt from being out of work. He seemed somewhat overwhelmed in his current transition. He did not exhibit a sense of self-efficacy. His self-esteem had declined. What was authentic to him was no longer valued by those who made hiring decisions. As a result, he had lowered his expectations. He seemed defeated.

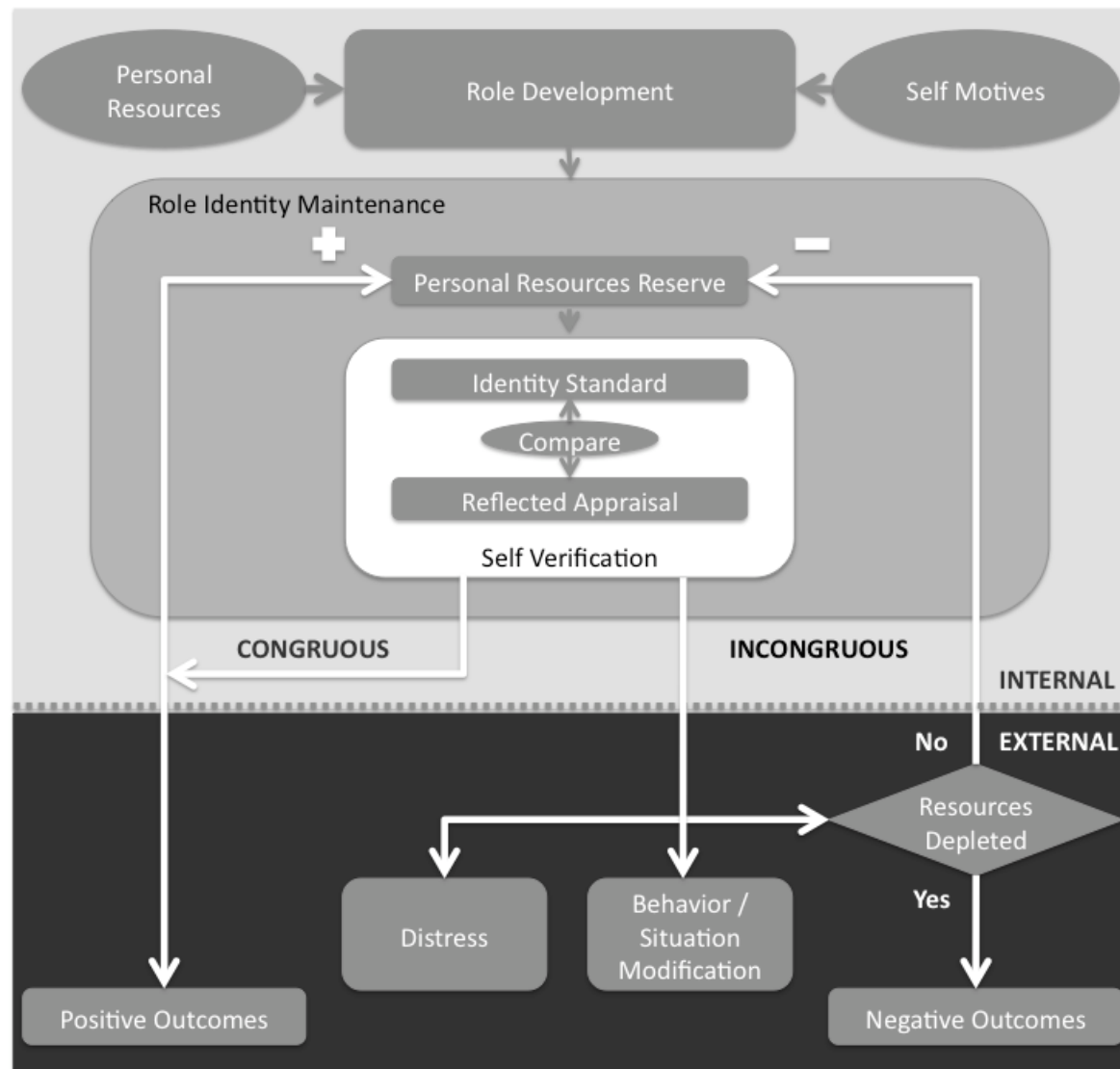
Drew and Andy seemed to be on the verge of withdrawing from the workforce. They were not maintaining their work or transition role identity. They epitomized the risks of being unable to self-verify as older workers in the restructured economy. Whether or not they had a future role in the workplace appeared unclear. If they did have a place, it seemed likely to be outside of the professional ranks in a contingent role. They had been downwardly mobile in recent years and had been marginalized by the intersection of aging and economic restructuring. Their future was uncertain.

## **Summary**

The previous chapter and this chapter describe the identity processes associated with the transition role as frequently occupied by boomer professionals in the restructured economy. I discussed possible outcomes of these identity processes, suggesting that positive outcomes, distress, and more severe negative outcomes result, to varying degrees, from being in transition.

In the next chapter, I delve deeper into the positive and negative career outcomes typically experienced by boomer professionals. I emphasize the qualities that characterize older workers who pursue or are directed toward these various career trajectories following transition.





**Figure 8.1. Transition Role Identity Maintenance**

## **CHAPTER 9 – CAREER OUTCOMES**

In the preceding chapters I have presented theoretical results that conform to an identity theory framework. For the older worker in the era of economic restructuring, worker roles have changed and the transition role has become more common as workers are frequently displaced or pursue new career paths. Structure, particularly in the form of hegemonic distortions and career-track effects, influences the development of these role identities and affects how workers maintain their work identities. Workers in transition are especially challenged to maintain their identities and must strive to successfully manage personal resources over the course of their period of transition. These findings contribute significantly to the research objectives that I have established, but it remains to be shown how boomer professionals' careers fare over time. My goal is to, as a minimum, provide insight into the outcomes experienced by boomer professionals in the restructured economy, and, to the extent possible, generalize participants' experiences to the broader factors affecting career outcomes.

Toward this end, I analyzed the career trajectories of the participants in my study. If averages could describe the typical participant's career, he would be a white male, 54 years of age with a 32 year long career that began in 1977. The career would likely be in the technology sector after having earned an MBA from a relatively highly ranked university. The "typical" participant's hypothetical career trajectory would have risen to a middle management position, but would have been interrupted involuntarily two times, with the typical participant currently in transition seeking to find a traditional job with a corporation involved in the primary economy. They would be very optimistic about the future and reaching their objective.

Of course, the typical career does not exist among the participants and is unlikely, or at least atypical, in the larger population of boomer professionals. None of the participant's career

experience matches this hypothetical. In fact, examining the career paths of the participants highlights the variability represented in this study and likely in the broader population. For example, I considered *temporal factors* by investigating the length of time participants had been unemployed in the past, the length of time that they were currently unemployed, and the age at which they experienced an interruption to their career.

Vic White's experience provided an interesting case in this regard. He had been involuntarily out of work at least five times, depending on the criteria used. When he was 32 the company that he worked for was acquired. He never considered seeking employment with the acquiring company. He viewed himself as a technology sales person and the new firm was not a technology company. After about six months he found work with another technology company in another city. Approximately six years later his new company was once again acquired. He was located in the southeast and there were jobs available with the new company in the northwest, but he did not want to relocate. He found another job that same year, when he was 38, in the same city that lasted for seven years. It ended with another acquisition, typical of the technology industry, but this time he found employment with another technology company not only in the same city, but in the same building. He was technically unemployed, but only for a matter of hours. That company went bankrupt five years later and he moved to another technology company in the same city following a year-long job search at the age of 51. During this time he invested in a fast food business, planned to become a full-time entrepreneur, then backed out of the deal due to extenuating circumstances. He then worked for small technology company owned by a friend until a significant loan fell through, leaving him unemployed. He then worked for his own LLC, doing market analysis on a contingent basis for the past three years. At the time of the interview he was working on starting his own technology company.

First, as this example demonstrates, the lines between employed and unemployed are often blurred. Does failing to pursue available positions after being displaced by an acquisition constitute involuntary unemployment? Does choosing not to relocate? Does working to buy a fast food franchise, a process that unfolded over more than a year, qualify as employment? I established criteria regarding self-employment by defining entrepreneurship to be full-time employment when a business plan existed, money had been invested, and it was the individual's primary (i.e., at least approximating full-time) work pursuit. By these criteria, Vic was employed, but he did not earn any income. His career was certainly interrupted and it was due to economic restructuring in that he was pursuing franchises because he was tired of losing his job to mergers and acquisitions in the technology sector. This is the type of experience in the restructured economy that I think is important to examine, but it is an example of the difficulty of evaluating employment situations with consistent criteria.

Second, the lines between full-time and contingent employment (underemployment) are difficult to assess. I often asked participants to give me an idea of the percentage income they were earning from contingent jobs in comparison to their previous full-time corporate employment. This worked in some situations, but not all situations, but I was unwilling to invade participants' privacy by asking about absolute income amounts. In Vic's case, was working sales for a friend's small company underemployment? He seemed to consider it full-time employment. Was working as an independent consultant underemployment? My interpretation is that he was spending most of his time working to get his new technology company off of the ground and virtually no time consulting. Although he's been "consulting" for over three years, I consider him to be currently unemployed and in transition, although he previously did enough consulting

to have been categorized as underemployed. The point at which he changed from underemployed to unemployed is indeterminate.

Third, Vic experienced career interruptions at ages 32, 38, 45, 50, and 55. All occurred as the result of issues associated with economic restructuring. However, he made personal decisions to reenter the job market without pursuing the possibility of employment with merging companies in the first three situations at age 32, 38, and 45. Consequently, determining his age when he first experienced an involuntary job loss is also subject to interpretation. In the case of Vic White's career, assessing each of the temporal considerations that I thought to be important was subjective at best.

Ambiguities such as those associated with Vic White's career also applied to many of the other participants. Similarly, many career-related areas of interest were difficult to consistently categorize. As a result, for much of my analysis of career outcomes, I report observations that are highly subjective.<sup>15</sup>

In general, from a temporal point of view, career interruptions that occur at an older age are more traumatic than those experienced at a younger age. Older boomer workers often have less self-confidence than younger boomer workers. Of the eight participants in the oldest age group (58-63), three had a negative outlook and five had a positive outlook. The other two age groups had only two workers currently in transition with a negative outlook. Stated quantitatively, 38 percent of the older group was not optimistic and only 8 percent of the middle age group and 8 percent of the youngest age group were not optimistic. The three pessimistic participants in the oldest age group had experienced a total of fourteen career interruptions compared to one each for the pessimistic members of the other two age groups. I suggest that the

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<sup>15</sup> Arguably, all of this qualitative research is interpretive. What I am suggesting at this point is that the my assessment of the factors which affect career outcomes, reported in this section, is more subjective than the findings discussed elsewhere.

more negative outlook among older workers in transition is likely the result of having experienced negative outcomes. However, other factors may be that they are deterred by expectations of ageism or they may become less effective with age at managing personal resources.

The two other pessimistic participants, one each in the two younger age groups, experienced career disruptions at relatively younger ages and this experience, combined with their job search experience, seemed to have negatively affected their outlook. On the other hand, many of the other participants had rebounded from earlier job losses and currently had a positive outlook. My assessment is that younger workers have had generally more positive outcomes when faced with career interruptions and typically have less resentment and maintain a more positive outlook as a result.

A total of ten participants had experienced relatively long career interruptions lasting over a year in active job search, with two years out of work not being uncommon. Of these participants with long career lapses, six were currently in an extended transition and four had exited transition. Three of the six had positive outlooks and three had negative outlooks. Longer periods of transition seemed to have a lasting, but varying effect. Following a long transition that resulted in a traditional job, the participants were particularly adamant about avoiding the situation in the future and took proactive steps to keep their current jobs. Those who were changing their career path or were self-employed seemed less concerned. Of those currently in extended periods of transition, my evaluation was that they were less optimistic than other participants, consistent with the notion that they had lower reserves of personal resources. Career outcomes for these workers were yet to be determined at the time of the interview, but I did not consider them to be in a strong position for a positive outcome.

I also considered *gender* in assessing career outcomes. Nine of the 20 participants currently in transition were women. They were somewhat overrepresented in this category because they consisted of only 40 percent of my sample. Stated differently, 69 percent of women who were participants were currently in transition, versus 40 percent of the sample, compared to 55 percent who were male, versus 60 percent of the sample. Of the 13 participants currently on a positive career path, four were women. Therefore, 31 percent (four of thirteen) of the women were currently working or actively reinventing their career compared to 45 percent (nine of 20) of the men. On the other hand, considering the 66 involuntary transitions experienced by participants, women had been affected an average of 1.7 times in their career and men had been affected an average of 2.2 times. Considering current situations, then, women had slightly less favorable outcomes, but, in contrast, historically, this group of women had experienced fewer career interruptions. Certainly, no tangible conclusion could be drawn from these numbers. I do, however, offer the following observations regarding gender and career outcomes.

First, women participants seemed more committed to networking as a means of negotiating transition than men. Both sexes were active networkers, but women seemed to take a more calculated approach. Some used metrics to quantify their activities and they were more likely to use internet sites such as LinkedIn and Facebook for job-related network activities. Second, while both men and women sought to achieve more authenticity in their work, women seemed more willing to pursue non-traditional careers. That is, men seeking authenticity tended to alter their careers within more socially and economically acceptable positions that did not involve a significant loss of status, such as financial planning. In contrast, women took more risks, such as Beth Huff leaving a position as a marketing executive to pursue an art career and Amy Gliss leaving a corporate legal position to be a stay-at-home mom. Third, a subset of the

participants drew heavily on faith during their transition experiences. However, women seemed more likely to draw from spirituality in a general sense, whereas men adhered more to traditional mainstream religion. For example, Marie Pierce visited the Far East and met the Dali Lama during her travels in search of her spirituality. In contrast, Tony Vaughn and Earl Birch attached meaning to their local churches, Catholic and Baptist respectively.

Another factor that I expected to affect career outcomes among participants was the *salience of work* to their identity. For example, I expected a worker in need of income to be more committed to the transition role than a worker that was better off financially. This was not the case. Commitment to the transition role, and consequently career outcomes, did not seem to relate strongly to the degree that a job was financially necessary. For example, Wes Young had made large sums of money in technology companies during the dot.com era, but remained highly committed to his plans for his own technology start-up. On the other hand, Kirk Little's financial reserves had been depleted, but he took a much more casual approach to transition. Kirk had a positive outlook, but no immediate job prospects. At the time of the interview he was working contingently on a 100 percent commission basis in a sales position that was not providing any income. His family had received money from his wife's family to help them through the difficult times. Nonetheless, he was much less proactive in his job search than Wes. This pattern of commitment and career outcomes not relating strongly to need loosely maintained across the group of participants. A stronger predictor of career outcomes than commitment was work motivations. Those who were highly motivated to work had generally better career outcomes. That is, worker roles that were high in identity salience based on the desire to work, or to obtain non-financial benefits from work, were more relevant to career outcomes than those based on the financial need to work.



## Types of Career Outcomes

As a more objective analysis, I examined the various outcomes of the participants as broad categories of career directions. Of those who successfully exited transition, three distinct types of positive outcomes emerged involving three distinct worker types: Traditionals, Independents, and Reinventors. Traditionals are workers who re-enter the traditional corporate workforce after a generally conventional job-search. Independents leverage skills from their career up to this point as self-employed workers and small-business owners. Reinventors embark on new career paths by reinventing themselves as workers (see Chapter 4).

I classified participants who had successfully exited the transition role according to which career outcome they entered after transition. For workers who had been in transition multiple times, I considered only the last occurrence in order that no participant would be counted in my analysis more than once.<sup>16</sup> Five participants had not successfully exited a transition that they had entered after the age of 40 and were excluded from this part of my analysis as a result. I defined a successful transition as having attained a work situation that the worker was satisfied with on more than a short-term basis. For example, a participant who transitioned into a contingent job (underemployed) that they were actively trying to transition back out of was not considered successful. My projected categorization turned out to be fairly evenly distributed among the participants, with 13 classified as traditionals, 8 as independents, and 7 as reinventors (see figure 4.1).

I then developed a list of seven role identity characteristics, based on previous analyses, which I used to describe each participant in their transition role. I focused on hegemonic effects

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<sup>16</sup> Boomer professionals do not limit themselves to one career classification. Some of the participants had transitioned into all three classifications, traditionalists, independents, reinventors, at various points in their career. Multiple career classifications were not unusual. I had initially intended to classify participants into one category, but that is not possible for all participants. Rather, I classified transition outcomes and generally associated the participant with their last transition for analytical purposes.

and personal resources for these characteristics because I had shown these to be the most influential in the transition role identity process. In addition, because these characteristics had emerged from earlier analyses, I had a basis on which to judge their applicability to each participant. The seven characteristics were as follows:

1. Having a youthful age identity
2. Being highly motivated to work
3. Focusing on or leveraging early career successes
4. Exhibiting a high degree of individuality
5. Expressing a high degree of self-esteem
6. Expressing a high degree of self-efficacy
7. Expressing a high degree of authenticity

I set a goal of listing the three characteristics that most exemplified each participant's role transition identity. However, in some case only two characteristics stood out for a given participant. In these cases I listed just the two characteristics. Using this approach, I determined the characteristics that were most often associated with each of the three transitional career outcomes. The results are shown in Figure 9.1. Coincidentally, each set of the top three characteristics included two "hegemonic effects" and one "personal resource," therefore I depicted each as hegemonic effects impacting personal resources and the combination influencing the transitional career outcome.

### ***Traditionals***

The key hegemonic effects for traditionalists are focusing on, or leveraging, early career successes and having significant motivations to work. Self-esteem is the primary personal resource for this group (see Figure 9.1). Early career successes are likely a significant influence

on traditional workers because they previously experienced favorable outcomes in traditional settings. They attach meaning to those outcomes and may hope to recreate them. Work motivations are a broad category, which includes obtaining fulfillment, a feeling of contributing, and a sense of authenticity. Workers vary in the reasons that they work and the amount of time and effort that they put into their work. Traditionals may see work as important, but primarily through the lens of conventional or established organizations.

For traditionals, self-esteem as the key personal resource is commensurate with the idea of a self-esteem reserve that has been built-up, in part, by lingering identities from early career successes. Further, self-esteem may be a pertinent self-meaning that traditionals realize through their work motivations. Self-esteem is an important quality to convey in a traditional interview setting, an important step that workers in this group must go through in order to obtain a new traditional job. Not surprisingly, individuality was not present in the assessments of those workers classified as traditionals.

### ***Independents***

The key hegemonic effects for independents are exhibiting a high degree of individuality and being highly motivated to work. Self-efficacy is the primary personal resource for this group. Individuality corresponds to the concept of a worker that has the independence to be self-employed or to start a company of his or her own. A self-motivated work motivation also is characteristic of this type of career. Self-efficacy, particularly the ability to achieve desired results, is crucial to self-employed workers. Therefore, the results of this analysis seem to stand the test of reason. Authenticity was not a ranked characteristic of any of the participants classified as independents. At least among this group of boomer professionals, workers went into business for themselves for reasons other than to develop their personal sense of authenticity.

### ***Reinventors***

The key hegemonic effects for reinventors are exhibiting a high degree of individuality and leveraging early career successes. Authenticity is the primary personal resource for this group. Individuality, again, is an appropriate characteristic for workers pursuing a non-standard career trajectory. Reinventors may seek to duplicate their earlier career successes by developing a new career path. The search for authenticity very much defines workers who are reinventing their career, as often the impetus for a career change is the search for work that has more meaning to the individual. The lowest ranked characteristic among reinventor participants was a youthful age identity. These workers are apparently redefining their careers irrespective of their age perceptions. That is, it is not their youthful age identity that is prominent in their decision to reinvent their career; instead they are willing to reinvent their career in spite of their age.

### ***Withdrawal***

I also analyzed the role identity characteristics of the five workers who I had determined were having difficulty self-verifying in their transition roles and were in danger of losing their identity and withdrawing from the workforce. Of course no personal resource is evident for this group because it is a lack of personal resources that causes their identity to be in jeopardy. The highest ranked hegemonic effect for this group is early career success and the second ranked hegemonic effect is individuality. Interestingly, work motivations do not surface as important for this group.

### **Contextualizing Career Outcomes**

The types of career outcomes that I have identified are a product of economic restructuring and boomer professionals' attempts to cope with the changes. Without the restructuring of the economy that has taken place over the past few decades, most boomer

professionals would remain in traditional careers. They would likely experience continued opportunities to contribute as traditional corporations would have created career ladders that extended career paths through retirement. Downsizing, and subsequently transition, would not be nearly as common as it is today. Workers would likely be focused more on contributing to the goals of their organization rather than managing their individual career. Without restructuring most boomer professionals would be looking forward to retiring with a pension, perhaps continuing to work part-time to remain active.

Economic restructuring, however, has altered the workplace such that transition is commonly experienced by boomer professionals. As the frequency of transition has increased it has also become more difficult for older workers to reacquire traditional jobs. At the same time, whether due to age or as a backlash against economic restructuring, older workers are seeking more authenticity in their work. The net effect is that contemporary career outcomes have developed, primarily to satisfy the objectives of the restructured economy, but also, in small part, to meet the needs of individual workers. Economic restructuring is served by older workers moving away from the primary economy toward self-employment, primarily as independents, and pursuits that are considered more authentic, primarily as reinventors. Businesses are free to pursue less expensive younger workers who fit their corporate cultural preferences (i.e., that are malleable to organizational missions). Companies in the restructured economy are further served by transition becoming an acceptable situation that is experienced by many workers who do not reject the imposition, but embrace ways to survive the ordeal.

The impact on older workers, however, is significant and largely negative. Today's traditional career outcomes require more work hours and introduce more role strain than previous traditional employment. Independent and reinvented career outcomes often are on the

periphery of the core economy and generally provide less income than traditional jobs. Worse, the number of older workers who are withdrawing is likely increasing.<sup>17</sup>

The analysis of career outcomes that I have conducted presents the characteristics that describe workers involved in these contemporary work situations. Within an identity theory framework, I have shown that different types of structure contribute to worker role identities following transition. Further, different types of personal resources are key to identities within these new work roles. I suggest, then, that transition role identity and post-transition worker role identities are linked by the structure that forms those identities and the personal resources that maintain those identities. A logical extension of this idea is that these characteristics also have continuity with previous worker role identities. However, it's possible that these characteristics become more critical during transition and, as a result, are more of a factor post-transition than prior to transition.

My analysis consisted of examining characteristics of participants predominantly in their current work situation. Twenty participants were currently in transition, seven had recently exited transition, and six had moved into post-transition situations. The analysis, then, is highly focused on transition and post-transition identities. Pre-transition characteristics were considered, but were the product of retrospective accounts and potentially less accurate than meanings conveyed based on current experiences. With that caveat, it seems that post-transition identities become somewhat more galvanized toward the defining characteristics as a result of having

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<sup>17</sup> Data on rates of participation by age group is limited, focusing more on month-to-month trends than longer-term trends. Older workers are disproportionately displaced in the restructured economy and have greater difficulty reentering the workforce (Sicker 2002). This was true during years of relatively steady unemployment, suggesting an increase in the number of older workers who have withdrawn. As the recent increase in the unemployment rate over the most recent five quarters has occurred, there is no reason to believe that the situation has improved for older workers.

experienced transition. However, the notion of a thread that runs through each of the role identities that a worker occupies during his or her career also seems to be demonstrated.

Three types of structure, defined as adaptive distortions earlier, early career success, work motivation, and individuality, have the largest impact on career outcomes. Youthful age identities seem to be more ubiquitous and to be less of a differentiating influence on a worker's career path, although those with more youthful age identities are more likely to pursue non-traditional career paths. The three forms of structure originate from the ideology of economic restructuring, thus connecting capitalist hegemony with identity formation that results in career outcomes in the restructured economy.

Early career success, which was facilitated by economic conditions and internal labor markets during the early years of economic restructuring, is a significant structural influence in three of the four career outcomes. Early career success is less important only for independents, suggesting that their identity is based more on what they, and significant others, expect of themselves today rather than past accomplishments.

Individuality also has origins in economic restructuring as workers have been shifted from organizational responsibility to individual responsibility for their careers. This individuality appears to have been embraced (i.e., had a stronger influence on identity) more by workers— independents and reinventors—who are willing to move away from traditional corporate jobs. Interestingly, the objectives of the restructured economy have been met as organizations successfully divested themselves of career responsibility and then, later, contributed to workers who find ways to avoid unemployment outside of the corporate domain. If these workers were counted in the unemployment statistics, the pressure on the economy would be significant.

Work motivations have been dramatically affected by economic restructuring as workers witness their associates being downsized and the additional workload being transferred to the remaining employees. This form of structure is significant in traditional corporations who often downsize without a concrete plan for how to handle the work that was formerly performed by a higher number of workers. It is also structurally critical to independents who are not likely to survive self-employment without a strong work motivation.

The structure that affects worker role identities, those associated with contemporary career outcomes, results from advantages to economic institutions and organizations. That worker identities have been influenced by this structure and that career outcomes exist that are characterized by this structure is not surprising. This is an example of identity theory providing insight into the career outcomes that have evolved within the restructured economy. Further, it exemplifies how structure, largely a cohesive force during the era of economic restructuring, varies in terms of influence on individual workers. Workers experience this structure slightly differently through different interactions and roles, but they also vary in how they internalize structure during identity development. The result, then, is boomer professionals who are likely to have varying career outcomes in the restructured economy.

Earlier, I suggested that personal resources, particularly in the form of a reserve, are key to successfully negotiating transition. It is not surprising, then, that role identities associated with different career outcomes seem to be infused with varying types of personal resources (and self-motives). My analysis shows that each career outcome is aligned with a different personal resource: self-esteem for the traditional, self-efficacy for the independent, authenticity for the reinventor, and a loss of personal resources for the worker who withdraws.



Independents and reinventors tended to wear their personal resources, self-efficacy and authenticity respectively, on their sleeve. Traditionals' relationship with self-esteem was much less direct and as a result, much less quotable. For example, traditional Fran Kline alluded to the self-esteem her coworkers derived from their jobs following downsizing at her previous firm:

And you know, I would say that that is true of every person who was in my group back at [my old company], everyone left, was either driven out or quit, and all of us without exception wound up in jobs where we are happier, more fulfilled and really more challenged...

Terri Downs, another traditional reflected on how highly thought of her contributions to her company are throughout her network. She is highly regarded not only in her direct chain-of-command, but also by coworkers and colleagues throughout the world. Their respect is very important to her and it provides a source of self-esteem.

In contrast, independent Phil Rich stated "I resigned from unemployment [to concentrate on my business] "and declared myself president of [my company]." Or, as Tina West declared, "I feel like I just have to do this. It's a big gamble. We might have to sell our house... But if I don't try, life just wouldn't be worth living. I just have to." Other accounts by independents suggest the importance of their independence and the sense of self-efficacy that they leverage as independents. Mike Noone, a sole proprietor and independent suggested his sense of being self-efficacious when he stated "I work very hard at what I do. I have tremendous knowledge, so I can get things done very efficiently relative to [my business]." Similarly, Nick Prine reflected on being successful as an independent, managing his own business. He stated, "It's important. That's why I work as hard as I do. I want to be successful. I don't want to go back into a company. I would if I had to, but I don't want to." Wes Young drove home the point when answering my question about his confidence:

Well part of it is, you know, the stuff that I've done in the past – I've been successful at it. I've been involved in three kind of technology startup...and I've made them happen. And two, I've actually gotten a view into the capabilities of a lot of people who are doing this and have reached the conclusion that I'm better than 95% of them. And I don't want, the last thing I want to do in the world is be arrogant and cocky, but...it's just, I was fortunate enough to have some good experiences that I was able to learn some things that other people weren't able to learn. And to articulate what those are is kind of difficult, but...I just kind of know.”

Les Mayor is representative of the reinventors' association with authenticity reflected in his statement as follows:

I really want to do something at this stage of my life where I wanna make a difference. I really, I'm driven by wanting to make a difference. I want to do well and do good at the same time. It's part of my baby boomer syndrome...you know, we tend to want it all.

Brian Woods was similarly direct when he declared:

I reached a point where money just wasn't that important to me anymore. I wanted to do something that had a deeper meaning to me...and something that might have meaning to my grandchildren. So, I decided to continue my education. My years with [a Fortune 100 company] were great, but being a scholar is who I am now.

My analysis indicated a clear relationship between self-esteem as the primary personal resource for traditionals, self-efficacy for independents, and authenticity for reinventors.

I further evaluated whether exhibiting the personal resources associated with a given career outcome affected success that a participant had in achieving that outcome. For example, were independents who were characterized as being self-efficacious more likely to have successful outcomes? I found that independents who were characterized as being the most self-efficacious had the most success in terms of negotiating transition or having a positive outlook in transition. Similarly, reinventors who were characterized as being the most authentic were more successful in their career pursuits. The relationship for traditionals was less clear. Self-

efficacious traditionalists were as successful as traditionalists characterized as having a high level of self-esteem.

Further, I examined whether youthful age identities were a factor in the outcomes of traditionalists, independents, and reinventors. The most successful independents combined self-efficacy with youthful age-identities. To be clear, participants characterized as having role identities that were influenced by individuality, work motivation, and self-efficacy were more likely to be independents. However, the most successful independents combined self-efficacy and youthful age identities as predictors of positive outcomes. Similarly, reinventors combined authenticity with youthful age identities to achieve successful outcomes. Traditionalists did not seem to have a similar relationship between self-esteem and youthful age identities as a predictor of successful outcomes.

Leveraging youthfulness may be more than maintaining a youthful age identity. It may also involve becoming wiser at using the resources one possesses. As Mike Noone stated:

I don't have unlimited energy. I really have to manage that. I have a lot of energy, but I can run out of it. In my younger days I had unlimited energy, but I don't have that anymore. And, uh, if I run out of energy I get pretty negative. It's kind of part of that dysfunction. So, I can't afford to put myself in a negative frame-of-mind.

Similarly, Rod Steele suggested when discussing how his management skills had evolved that he has had to be selective:

I encourage project managers to be tough, but I'm not sure I have that mental toughness any more. You gotta be young to do that! It's a different mental toughness to manage 50 project managers than it is to manage a project! I've cultivated the skill set to manage the 50 project managers and I've let the skill set to manage a project atrophy.

Career outcomes are an extension of the concepts and findings that I have introduced.

The ideas presented are consistent with economic restructuring theory presented in chapter 2 and identity theory presented in chapter 3. Career outcomes are linked to structure, particularly

hegemonic distortions discussed in chapters 5 and 6, to identity development described in chapter 7, and to personal resources introduced in chapter 8. I have provided a conceptual framework for future work that measures the identified structural components and personal resources as predictors of career paths and distress and identity loss due to displacement from the workforce.

### **Transition Identity Theory Summary**

In this chapter, I have continued to develop the concept of transition role identities as a construct for examining workers in transition. Building on the transition role acquisition process described in Chapter 7, I have investigated transition role identity maintenance and transition role-exits, as illustrated in Figure 8.1, and career outcomes in this chapter.

I have analyzed career outcomes to advance a theoretical relationship between transition role identities and role occupant behavior as shown in Figure 9.1. For example, a worker in transition who exhibits a high degree of individuality and work motivation in a transition role identity that is maintained predominantly with self-efficacy is likely to assume an independent work role when they exit transition. These results suggest that the forth criterion for considering transition as a separate role, that role occupant behavior in transition must be related to his or her transition role identity, has been satisfied. All four criteria, then, have been met, supporting the transition role construct and, consequently, the transition role theory that I have proposed herein.

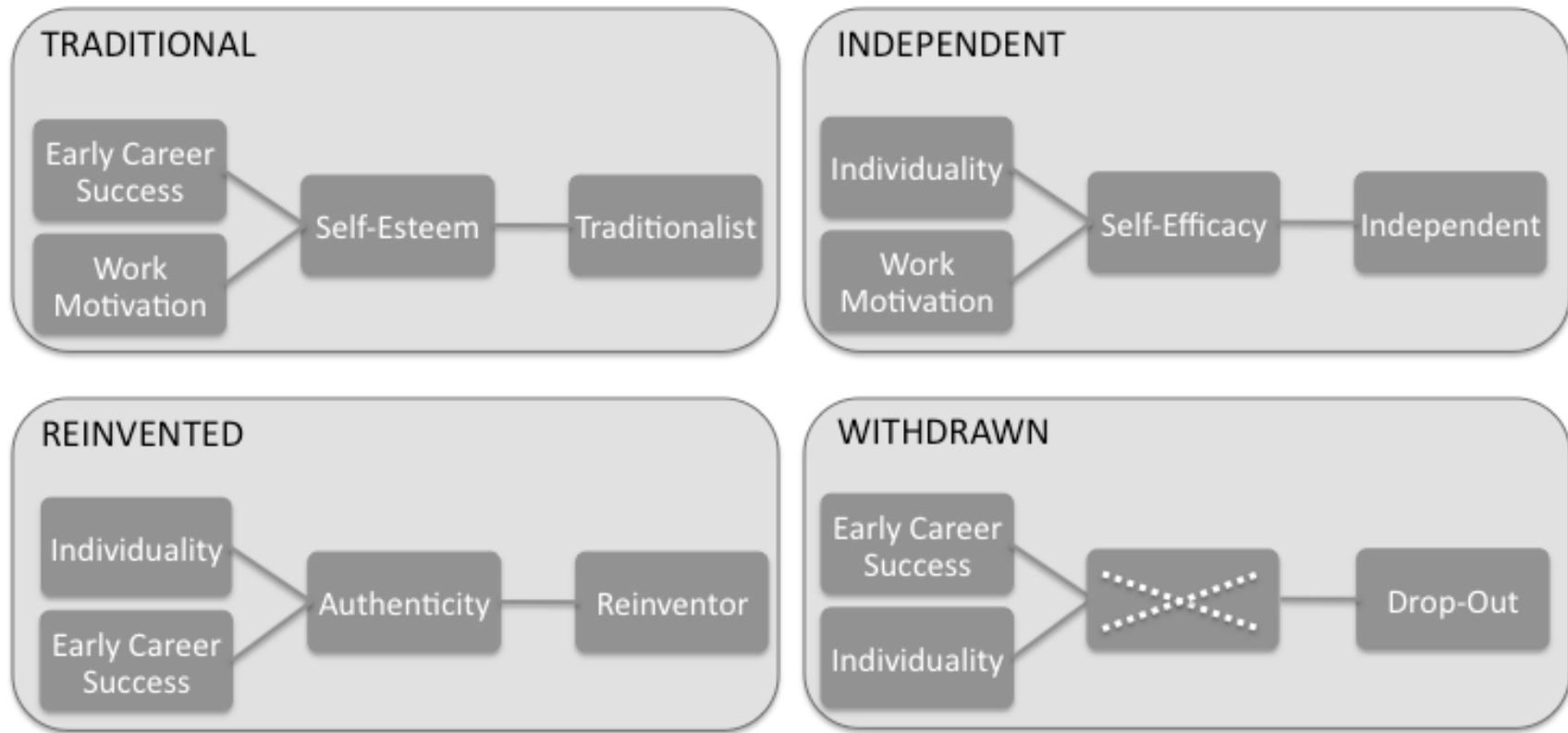
Figure 9.2 provides an overview of transition role identities. Both structure and agency are important factors influencing transition role identities, although structure seems much more dominant. Role-taking is the mechanism by which structure affects role identity acquisition. Development of transition role identities is particularly influenced by hegemonic effects and, to a lesser degree, by career-track effects. Lingering identities comprise another key structural aspect

of role acquisition; however lingering identities have both a structural and agentic component. Lingering identities, then, are shown as elements of both structure and agency in the figure. Other formative aspects of agency are depicted in role-making and self-motives.

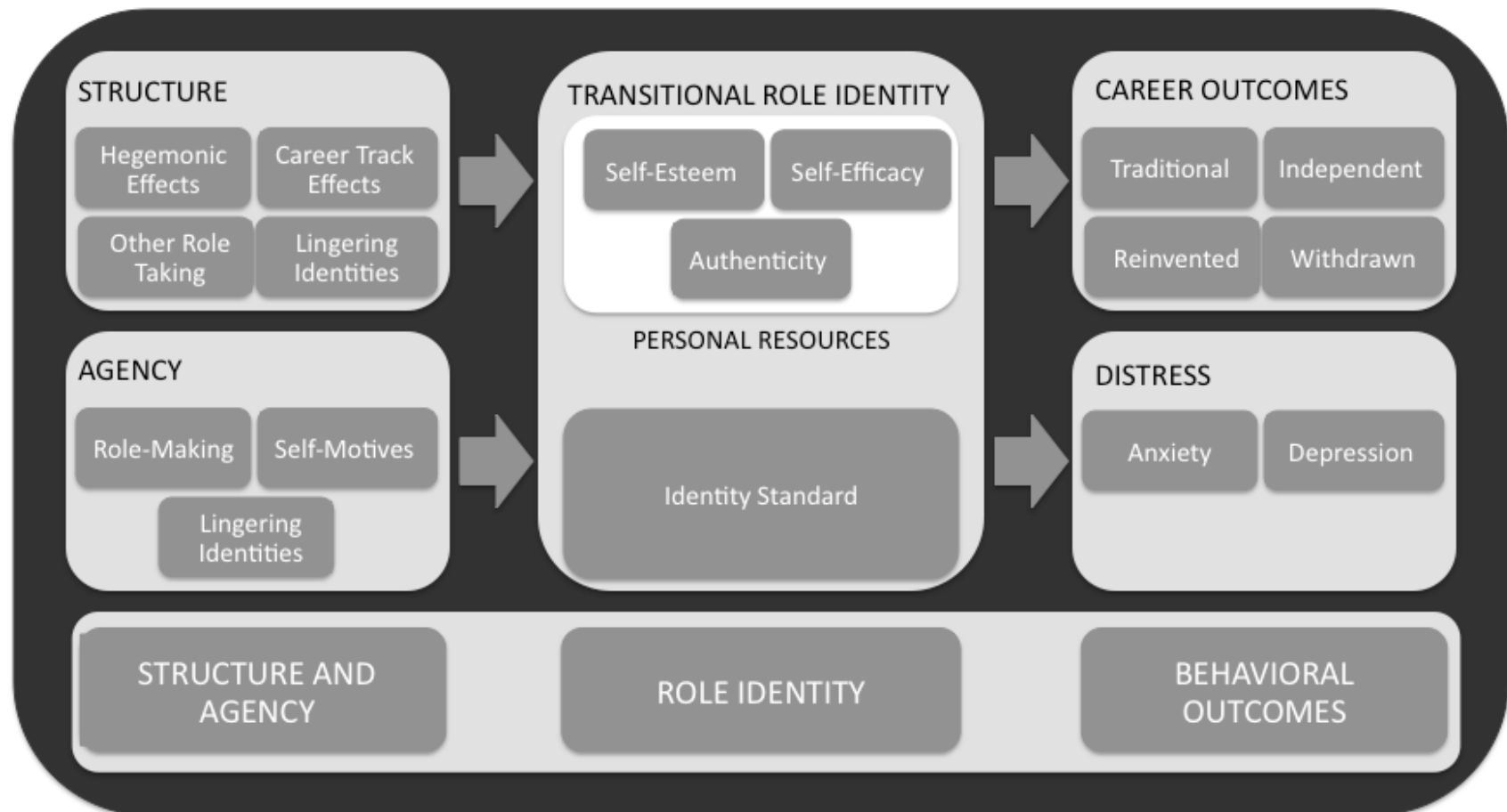
Transition role identities consist of an individual's sense of self in the transition role. Individual identity standards contain these self-meanings and are illustrated in Figure 9.2 as a key element of the transition role identity. I've also shown the importance of personal resources, particularly with regard to identity maintenance of the transition role identity. Self-esteem, self-efficacy, and authenticity are depicted as the three forms of personal resources that emerged in my analysis.

Within identity theory, identity mediates between structure and behavior. Behavioral outcomes associated with transitional role identities are illustrated as career outcomes and distress. The four forms of career outcomes that are evident are traditional, independent, and reinvented careers and withdrawal from the workforce. Distress represents common behavior for those in transition, which is shown as elements of anxiety and depression. Figure 9.2, then, depicts the three major aspects that I have examined and included in my theoretical argument of transition role identities: structure and agency, role identity, and behavioral outcomes.

In the next chapter, I discuss the conclusions that can be drawn from my research and address several relevant discussion points regarding the intersection of aging and economic restructuring and boomer professionals in transition.



**Figure 9.1. Career Outcomes.**



**Figure 9.2. Overview of Transition Role Identity Theory.**

## **CHAPTER 10 – CONCLUSION AND DISCUSSION**

### **New Theory**

With this research I have integrated multiple theoretical perspectives to elucidate increasingly common circumstances currently affecting today's boomer professionals. These workers are shaped by capitalistic ideology, which distorts their sense of reality in negotiating the restructured economy. Rather than questioning a system that fails to serve their best interests, they instead embrace a system that marginalizes workers in general and older workers in particular. They proactively adapt to conditions that provide for powerful elites and do little to subvert this power that diminishes their careers.

Certainly the choices are limited for these workers and striving to maintain their status in the labor market is the path that they have adopted. I examine boomer professionals' approach to growing older in the restructured economy by investigating the structure that influences their identity and how their identity shapes their behavior. In Meadian (1934) terms, I find that behavior is the result of social forces that are mediated by the self.

More specifically, I show that boomer professionals in the era of economic restructuring are the product of ideological structure that strongly influences their identity. When their careers are interrupted—an increasingly common occurrence in today's economy—they adopt role identities that facilitate the restructured economy and generally endeavor to reestablish their careers in that economy as quickly as possible, albeit with some personal toll. They succeed to varying degrees, often taking non-traditional paths that have emerged due to economic restructuring.

I advance theory that delineates four key aspects of this process. First, I describe relevant ideological structure and how boomer professionals respond to different aspects of capitalistic



hegemony. Second, I suggest that displaced workers occupy a new role, transition, for which I provide a theoretical argument for the legitimacy of the role and its development. Third, I examine identity maintenance during transition and detail a process in which workers capacity to manage personal resources largely determines their ability to successfully negotiate transition. Fourth, I depict four common career outcomes following transition and identify structure and personal resources that characterize workers who follow these career paths. My theoretical model provides a comprehensive and integrated perspective of boomer professionals in the restructured economy, which I explain in more detail below.

### ***Hegemonic Structure***

Economic restructuring and aging hold substantial meaning for boomer professionals, which they comprehend as structure that affects their careers. They understand and attach meaning to broad economic changes, such as globalization, downsizing, and casualization of the employer-employee relationship. Boomer professionals hold specific meaning for economic conditions that have a personal impact, such as mergers and acquisitions or deregulation that explicitly have affected their career. Typically they relate transition points in their career, including job changes and job losses, to the prevailing economic conditions at the time. However, they do not perceive the economy as an institution that has changed in ways that impose unreasonable constraints on their career opportunities. Boomer professionals do not seem to grasp the full extent of economic restructuring's impact on the quality of their careers.

Certainly recessions and downsizing are viewed as limiting, however not as agents of marginalization, but rather as conditions to be actively negotiated. In general, economic restructuring, including downsizing, is accepted as a legitimate aspect of a free market economy. Boomer professionals have little issue with companies maximizing profits, even when those

steps involve personal ramifications for their career. While they understand that they are vulnerable to economic changes, meanings are much more often associated with managing the situations created by economic restructuring than they are with feeling unfairly marginalized.

Boomer professionals also attach strong meanings to their age. They generally believe that their chronological age overstates their age in terms of how they feel, think, and behave. Like economic restructuring, they understand that they are vulnerable to growing older, ageism, and age discrimination, but they do not generally feel marginalized by age. The strongest meanings associated with aging involve maintaining youthful age identities. Boomer professionals work very hard to be perceived as being young, or at least more youthful. They attach meaning to managing others' perceptions of their age and striving to prevent ageism from limiting their careers. Boomer professionals do not seem to accept age as a constraint and are proactive in trying to assure that aging does not become restrictive.

The meanings that boomers attach to economic restructuring and aging, however, do not match the realities of growing older in the restructured economy. Scholars have articulated several ways that economic restructuring is detrimental for older workers and, by extension, for boomer professionals. Age also has been shown to be a disadvantage in the restructured economy. Boomer professionals do not seem to be fully aware, at least not on an actively conscious level, of the implications that economic restructuring and aging have had for their careers and the quality of their lives. Applying ideology theory, I explain this paradox as boomer professionals being influenced by the hegemony of capitalism and powerful elites who benefit from the situation while at the same time striving to succeed in a situation in which they are systematically marginalized.

I identify three types of ideological distortions that characterize the structure that boomer professionals perceive at varying levels of sentience. First, false consciousness entails structure associated with capitalistic ideals that older workers accept without conscious thought. The notion that capitalism best serves their interests is simply accepted at an unconscious or very low level of awareness. Second, passive distortions involve structure associated with a passive acceptance of profitability and competition as unquestioned socioeconomic pursuits. Boomer professionals do not actively consider the full implications of these fundamental tenets of economic restructuring on their lives. Instead, they passively accept profitability and competition as justifiable and necessary economic realities. Third, adaptive distortions result from efforts on the part of boomer professionals to adapt to the restructured economy by embracing the ideology of economic restructuring.

I delineate six types of adaptive distortions: early career success; proactive behavior, individuality, work motivations, authenticity, and youthful age identities. Early career success, resulting from companies having created positive trajectories early in the careers of boomer professionals, instilled a success ethic that continues to influence today's worker. The resulting success ethic creates a distortion for the individual worker because similar success is not readily attainable in the current restructured economy. However, the pursuit of this success ethic serves the objectives of economic restructuring by developing worker role identities that place a high value on being successful.

Proactive behavior, creative individuality, and work motivations are adaptive because these types of action aid workers in the negotiation of the restructured economy. These themes are a distortion for the individual worker in the sense that workers expend increasing effort in the

pursuit of decreasing rewards. Economic restructuring, however, is facilitated by this adaptation as boomer professionals work harder and smarter to stay afloat in the restructured economy.

Authenticity differs from the other adaptive distortions because, unlike the other themes, it does not align perfectly with the ideals of economic restructuring. Nonetheless, authenticity is adaptive as a means of coping with or responding to the changing work environment. It is a distortion because authenticity is not widely attainable in today's primary labor market for most workers. Workers in search of authenticity often remain active participants in the workforce, but shift from the primary to the secondary labor market. As such, they serve economic restructuring by shifting workers who are not needed in the core economy to the periphery economy. These workers find meaning, contribute to the broader economic activity, and do not create a backlash against economic restructuring by becoming disaffected. This effect may also create a reserve of workers who can be pulled into the core economy in an economic upturn without any current economic cost. The restructured economy benefits from older workers pursuit of authenticity as long as there is not a labor shortage.

Another way that boomer professionals adapt to the restructured economy is by adopting more youthful age identities. For the individual this is a distortion because ageism remains a reality in the workforce and youthful age identities are ultimately ineffective in combating discriminatory behavior. Economic restructuring, however, gains from workers who strive to conform to the prevailing corporate youth culture.

I find that the ideological distortions that influence boomer professionals not only support the ongoing process of economic restructuring, they serve to accelerate the process. By adapting to the restructured economy and working to thrive within the constraints that economic restructuring imposes, these workers actually contribute to the propagation of the ideology that

undergirds the new economy. As the fastest growing segment of the labor market, boomer professionals help to construct the very system that limits their careers. In effect, boomer professionals have been co-opted into working hard to perpetuate an economy that benefits more powerful elites and, as a group, settling for a compromised share of the socio-economic rewards.

### ***The Transition Role***

I also find that the effects of structure on boomer professionals' careers varies across different career-tracks. CXOs experience economic restructuring differently from middle-managers and middle managers differently from individual contributors. I found hegemonic structure and these career-track effects to be the dominant influences in shaping the worker role identities of boomer professionals.

Worker role identities generally relate directly to the occupations and jobs that workers occupy. However, I find that a new worker role has emerged in the restructured economy. Transition has become a legitimated social position that is affecting more and more boomer professionals. The 33 participants in my study had experienced 84 occurrences of transitioning from one work situation to another. Sixty-six of these transitions were involuntary. These data led me to establish four criteria that support the thesis that a separate role is the most explanatory means of conceptualizing transition within identity theory.

I list the criteria and associated results as follows:

1. Transition must be an accepted position in the social order – I demonstrate that transition has become an accepted position in society and shared meanings that define the position have been formed to the point that institutions have arisen to facilitate or support the expectations that are associated with the transition role.

2. There must be definable social expectations for an individual who occupies the transition role that facilitate the process of role-taking – For boomer professionals, I show that the transition role is given broad definition within the social order, infusing the role with the shared social meanings that are associated with a worker who is in transition.
3. There must be evidence that role occupants attempt to self-verify against an identity standard in order to maintain the transition role identity – I examined the process of identity maintenance in the transition role identity and demonstrate that workers in transition attempt to self-verify with favorable outcomes when they achieve self-verification and unfavorable outcomes when they are unsuccessful.
4. Role occupant behavior in transition must be related to his or her transition role identity – I show that characteristics which reflect transition role identity meanings translated into four specific types of behavior as demonstrated by specific career pursuits and outcomes.

Having met these criteria, I advance transition as a new, separate work role that is a particularly useful construct for conceptualizing the restructured work experience for many workers. My assertion of a theory of transition role identities provides an explanatory model for understanding the behavior of boomer professionals and how this behavior is embedded in social structure. The application of transition role identity theory also provides a framework for explaining why some workers are more successful in negotiating transition than others, the origins of distress experienced by those in transition, and the various career situations that boomer professionals enter following a successful role-exit from transition.

Acquisition of the transition role involves structural influences that represent the social expectations of the role. Key aspects of structure are hegemonic structure and career-track effects. But, other aspects of role-taking also contribute to the definition and development of the

transition role. I also find that lingering identities from previous roles create a structural effect resulting from experiences in formerly held work or transition roles. Figure 9.2 depicts these forms of structure as shaping the transition role identity.

Agency is also a part of the role acquisition process, but structure is much more influential. Role-making occurs as boomer professionals strive to personalize their transition role. They also endeavor to infuse their role with self-motives that serve to protect or enhance their role identity. Self-esteem, self-efficacy, and authenticity comprise these agentic self-motives as individual workers vary in their actuation of self-motives (however, I found self-esteem, self-efficacy, and authenticity to derive primarily from structural processes). Lingering identities are also a source of agency as personal histories and their individual relevance varies among workers.

### ***Personal Resources***

Once a worker develops a transition role identity, it must be maintained throughout the time that the worker remains in transition. Resources such as self-esteem, self-efficacy, and authenticity are crucial to successfully negotiating transition. I classify these forms of self-protection and self-enhancement, that derive from structure, as personal resources (Stets and Cast 2007; Cast and Burke 2002). A worker entering transition has an initial reserve of personal resources derived from other roles and lingering identities, but transition offers little opportunity to replenish these resources. The dominant identity maintenance process during transition is one of drawing upon the reserve of personal resources.

An interesting facet of adaptive distortions, however, is that these effects are especially conducive to generating self-esteem, self-efficacy, and authenticity. The connection is clear between authenticity as a structural effect and authenticity as a personal resource, as it is between

proactive behavior and self-efficacy. Early career success is a form of lingering identity that creates self-esteem, and perhaps self-efficacy, that influences future role identities (Reitzes and Mutran 2006). Work motivations are a source of personal resources resulting from a strong work ethic that results in a sense of esteem, efficacy, or authenticity. Individuality, similarly, provides a sense of authenticity and perhaps self-efficacy. Finally, youthful age identities can also create personal resources in various ways depending on the individual's self-meanings.

The process of identity maintenance during transition, then, involves a primary component of personal resources being drained because it is difficult for the worker in transition to successfully self-verify. Many of the situations encountered, such as sending out resumes and receiving no response, have negative consequences for their personal resources reserve. Some opportunities arise to add to personal resource reserves by successfully self-verifying during transition, usually related to adaptive distortions. For example, a worker who proactively networks develops a sense of self-efficacy when their networking creates job opportunities. Individuals vary in how efficiently they use and generate personal resources, however, the net movement is toward depletion of personal resources. The worker must exit transition before depleting his or her personal resources or risk identity loss that is associated with withdrawal from the workforce.

The process while in transition is particularly distressing. Stress and depression are common because the workers' situations do not align with their identity standards. Just being out of work is incongruous with self-meanings associated with a strong work ethic. The worker in transition generally has difficulty self-verifying and the result is distress. All other considerations aside, such as loss of income and drawing on savings, there is a tangible cost to transition in



terms of distress. An economic system that routinely places boomer professionals in such a distressing position is a major contradiction to best interests of workers.

### ***Career Outcomes***

Many boomer professionals do successfully negotiate transition and continue their careers, although often on a different trajectory than they were on prior to being displaced. Many of the workers who exit transition with a positive outcome reenter the workforce in a traditional job. However, new outcomes have also emerged. Boomer professionals now often seek independence from traditional jobs and become self-employed. Others take steps to reinvent their career to obtain a better alignment with their current work objectives. I define these career outcomes as traditional, independent, and reinvented as shown in Figure 9.2.

Traditionals, independents, and reinventors are each characterized by different structure and personal resources that have the most effect on their career outcomes. Traditionals are influenced most by early career success and work motivation, while drawing primarily on self-esteem during transition. Independents are influenced by individuality and work motivation and draw on self-efficacy. Reinventors are influenced by individuality and early career success while drawing on authenticity. Those who are no longer able to draw on personal resources tend to withdraw from the workforce. While not a primary structural determinant of the type of career outcome, youthful age identity is a predictor of achieving positive outcomes. Workers who do not have age identities that are more youthful than their chronological age are more likely to remain in transition or withdraw from the workforce.

My theoretical argument regarding transition, summarized for boomer professionals, is that displaced workers must successfully negotiate a transition role in order to favorably position themselves for finding a new work role. During transition, they develop and maintain a transition

role identity that mediates between the structure that defines their situation and the outcomes that they attain. Structure associated with capitalist ideology is particularly influential and seems to be one way that workers in transition derive personal resources, self-esteem, self-efficacy, and authenticity, which facilitate transition role identity maintenance. Successfully maintaining identity during transition increases the probability of a positive outcome, while failing to maintain one's identity leads to distress and the possibility of retreating from the workforce. Positive outcomes that boomer professionals are pursuing are much broader than the traditional corporate career, and increasingly include independent pursuits, such as self-employment or business ventures, and reinventing careers, either within or outside of corporate entities. Workers categorized as traditionals, independents, or reinventors tend to exhibit different characteristics, augmenting the general predictive nature of the theory. The relationship between structure and agency, role identity, and behavioral outcomes, as specifically related to transition role identities is shown in Figure 9.2.

### **Existing Theory**

In addition to developing new theory specifically relevant to boomer professionals in the restructured economy, my research also validates several aspects of existing theory, primarily in two research traditions: identity theory and theory of ideology. Within the realm of identity theory, Stryker's (1980) structural symbolic interactionism and Burke's (1991) identity control theory are strongly supported.

Stryker's conceptualization of hierarchical structure, a key element of my research design, was particularly useful. Societal/cultural structure, stemming from broad institutions, large organizations, and smaller groups, comprises the primary forces shaping roles. Interactions at the micro-level are more agentive, dictated more by individual definitions of the situation.

Structure cascades down from the macro-level to influence the lower level structure in the hierarchy. Societal/cultural structure also creates situational structure by shaping the way that individuals interpret situations. Meanings at the individual level are the product of all of the levels of structure.

Boomer professionals' meanings reflect this structural hierarchy and the linkage between societal/cultural and situational structure. Further, situational structure tends to reinforce higher levels of structure when it is embraced by individual workers. Today's workers who have adapted to ideological structure associated with economic restructuring interpret situations and behave in situations in accordance with this structure. Doing so acts to further entrench the societal structure associated with the restructured economy, resulting in even more intensified structural forces. Tomorrow's worker then faces situations that are more strongly defined by economic restructuring. The net effect is that economic restructuring gains power because of today's workers' acquiescence to the ideology associated with the restructured economy. I find Stryker's structural symbolic interactionism to be a particularly applicable construct for explaining economic and ideological phenomena and suggest that the reproductive qualities of structure be more explicitly delineated within identity theory.

Other aspects of identity theory, such as roles, role-taking, self-motives, and lingering identities are certainly validated by my research. Roles are useful as constructs for understanding structure based on social expectations as described by Stryker (1980). However, I relate to the general expectations of society more based on the influence of power in my research, whereas I previously envisioned expectations based more on Mead's (1934) generalized other.

Turner's (1962) concepts of role-taking and role-making are helpful in distinguishing between structure and agency in role theory and as adopted in structural symbolic interactionism.

Role-taking was much more prevalent in my research although the lines between the two are certainly subject to interpretation.

The blurred line between structure and agency also affected how I characterized self-motives and lingering identities. Identity theory generally posits self-motives as deriving from agency, but I envisioned self-esteem, self-efficacy, and authenticity to have both structural and agentive origins. Similarly, lingering identities had elements of both structure and agency in my analysis. It seems that, based on my research, the opportunity exists for structural perspectives beyond what Stryker introduces with structural symbolic interactionism.

Burke's (1991) identity control theory is a valuable construct for understanding identity maintenance processes. The concept of self-verification as a process that compares an individual's identity standard to his or her reflected appraisal fit my data, particularly the notion of distress resulting from a failure to achieve self-verification. Also, Stets and Cast's (2007) extension of these ideas to involve resources is particularly useful. Personal resources conceived as being added and subtracted to and from a reserve seemed an accurate construct and provided the foundation for my theory that depleting this reserve leads to withdrawal from the workforce. The notion of personal resources also undergirded my assertion that boomer professionals with different career outcomes can be explained, at least in part, by which particular personal resource most characterizes their behavior.

Mannheim's (1931) ideas regarding ideology as a distortion of reality provides a basis for my explanation of hegemonic structure as reflected in unstated meanings. Rather than conceive of ideology as distorting reality, I envision ideology as distorting the construction of reality. I assert that boomer professionals participate in the construction of reality in ways that are not in their best interest and are distorted as a result.

With the caveats and refinements discussed, identity theory and theory of ideology were validated as explanatory constructs by my research. I began with the idea that identity theory would be especially useful as a framework for this research and found that to be the case. Work within identity theory has become less prolific with time since its introduction. My research not only suggests the explanatory value of the concepts, but suggests the applicability to contemporary issues. Ongoing work within this framework seems warranted.

### **Assessment**

When I first began this research I established four objectives that I outlined in the introductory chapter. My overarching goal was to examine how economic restructuring, combined with aging, affected the workplace behavior of boomer professionals. I expected that this investigation would require an understanding of the structure affecting these workers, how they perceived that structure, and how they responded agentively to these constraints. The processes involved in determining worker behavior would have to be examined and that behavior would have to be compared and contrasted across typical outcomes.

This study, of course, has evolved considerably since those initial objectives were established. However, in reassessing my research in terms of the original goals, I believe that they have been largely satisfied. Working within an identity theory framework, these objectives have been met as follows: (1) I identified the structure that has the most significant impact on worker role identities, (2) I defined the processes that specifically affect the development and maintenance of boomer professionals role identities in the restructured economy, and then (3) I connected their behavior to the previously identified structure as mediated by those identities.

To understand the structural constraints that were the most significant to boomer professionals, I analyzed meanings that participants' attached to the restructured economy and

aging. By contextualizing these perceived meanings within the theory associated with economic restructuring, significant hegemonic structure was identified as particularly influential.

Additional structure associated with different career-tracks was also highlighted. By describing the specific types of structure that have the greatest impact on boomer professionals, I have achieved the objective of understanding both the perception and the reality of structural constraints for this group of workers.

I also considered factors that are more agentic. I had expected that boomer professionals would be likely to resist being marginalized in the workplace. However, I found little evidence that these workers were successfully exercising individual agency to improve their work situation. Instead, they were striving to avoid marginalization by excelling on the terms dictated by the structure of capitalistic ideology. Those workers in traditional corporate jobs worked longer and harder to avoid being downsized. Those workers independently pursuing their own businesses generally endeavored to earn an income within the confines of the corporate structure (e.g., they sell their services to corporations). Those workers who are striving to reinvent their career were, for the most part, working toward a goal of reestablishing themselves within the corporate structure. There are examples of agency, such as relinquishing corporate salary for academic pursuits or for unpaid work as a stay-at-home mom. However, these examples of agency are atypical and, for the most part, the world of work is dominated by structure. Consequently, I have provided insight into the issues of structure and agency, although much more so on the structural side, that define the workplace as a social milieu (or a field in Bourdieu's terminology).

To understand how structure affects behavior, I examined relevant processes beginning with the identity theory assertion that structure influences identity and identity determines

behavior. Certainly, I found this to be true for worker role identities. I identified an overarching process in which hegemonic and career-track effects shape worker role identity and identity processes shape worker behavior. For example, an inability to achieve self-verification in the restructured economy results in behavior that is characterized by stress and depression.

I also considered other key processes that affect the contemporary older worker. In a work world where downsizing has become commonplace, I wanted to understand the process by which boomer professionals transition from one job to another or from one career to another. Rather than conceptualize this transition in terms of existing role exit theory, I found that this transition is better conceived as a separate role that today's worker moves into and out of as they experience career interruptions. I explored the process associated with the transition role, substantiated that the notion of a transition role meets the criteria of a role within an identity theory context, examined aspects of the role that are unique, and then described the characteristics of the role and how they affect its occupants.

Having established transition as a useful concept for understanding the workers' experience in transition, I further considered the process of identity maintenance while in transition. I applied the idea of a reserve of personal resources (self-esteem, self-efficacy, and authenticity) that protect workers' self-concepts and allow them to function positively while in transition. I further suggested that distress and identity loss are potential outcomes to which the worker in transition is susceptible. Processes associated with the development and maintenance of the transition role provides an extensive means for investigating the increasingly common experience of being a displaced worker. Identifying and examining these processes meets my objective of understanding the fluid and dynamic processes that affect older workers in the restructured economy.

Up to this point I had addressed behavioral outcomes in terms of distress and identity loss, but I also wanted to investigate how contemporary career outcomes differ from traditional jobs and what factors contribute to differing career paths in the restructured economy. I identified career paths that, in addition to traditional careers, have become more common as a result of economic restructuring. These paths include workers abandoning corporate positions to operate their own business (inventors) and workers who obtain education or skills to pursue a new career (reinventors). Career paths that have become more common also include those workers who withdraw from the workforce.

I analyzed workers who were on these four career paths—traditional, independent, reinvented, and withdrawn—in order to examine shared characteristics of those in each category and to investigate differences across the categories. I identified key structural influences and the dominant personal resource for workers in each type of career path. This analysis met the final objective of comparing and contrasting behavior across contemporary career outcomes.

Overall, this study provides a comprehensive assessment of how economic restructuring, combined with aging, affects the workplace behavior of boomer professionals. I follow an identity theory framework and successively address the components of the theory: structure, role formation, identity control, and behavior. As such, I have satisfied the overarching objectives as initially delineated for the study.

As I evaluated my findings, I also revisited Figure 3.1 from the perspective of assessing how well this study matched the theory of identity formation and development depicted in that figure or, alternatively, how my findings might alter that theory. The figure was intended as a depiction of Stryker's (1980) structural symbolic-interactionist view of role acquisition. In general, my analysis validates this theory and the figure includes several significant points that



held true in my study. For instance, the three arrows pointing from societal/cultural structure to roles compared to one arrow from situational structure to situations depict the relative influence of higher level structure compared to micro-level structure. This relationship certainly proved true in the study as economic structure and associated ideology was the most dominant form of structure. The concept of roles seemed to have much more explanatory power relative to boomer professionals than more situational concepts (i.e., classic symbolic-interaction tenets).

The macro-micro arrow was intended to indicate that high-level structure affected lower-level structure and that lower-level structure could affect high-level structure. However, I found that structure originating at higher levels and cascading down to the lower levels was much more predominant than structure originating at lower-levels and flowing upward. For example, earlier I introduced the example of casual-Fridays as a form of situational structure. Casual-Fridays have become a part of organizational and work structure at a macro-level. This type of structure, though, is much less frequent and much less influential than structure that originates at the higher levels.

My results further indicate that structure that originates at the higher levels cascades downward, but then becomes reified by individuals and incorporated into the lower-level structure. The upward path is dominated by lower-level structure reinforcing structure that originated at the macro-level. The figure, then, does not fully capture the effect of hegemony, originating with power elites within broad institutional structure, and how these ideals reinforce structure at all levels. I found that economic restructuring was propagated and intensified by the cumulative effect of individual workers internalizing the ideals of economic restructuring. In other words, for figure 3.1, the macro-micro arrow is correct, but should be interpreted as an indication of the power with which individuals, having adopted a particular ideology, serve to

ingrain higher level structure. The process flows from top to bottom, but the flow of ideological structure from the bottom to the top is crucial to sustaining the structural hierarchy.

### ***Strengths and Limitations***

The key strength of my research is that significant themes that emerged from grounded theory analysis form a cohesive basis for a theory of transition roles. The results fit well within an identity theory framework and address each aspect of identity theory that I defined as relevant to my research strategy. My theoretical argument combines economic restructuring theory, ideology theory, and identity theory concepts to form a unified proposition that links structure and behavior. By providing a comprehensive analysis of transition role processes, I integrate ideas that explain key aspects of boomer professional transition.

I evaluated my study in terms of its contributions to the sociology of work, theory of ideology, and identity theory. I have extended the study of the sociology of work by providing a cohesive analysis of the impacts, perceptions, identity implications, and common career outcomes of older professional workers in the restructured economy. Work theory has generally addressed economic restructuring and the impact on workers in general, and older workers specifically, as transformations that emanate from changes in the broader economy (Capelli et al. 1997; Sicker 2002). However, in addition to describing how work has been transformed during this era of restructuring, I have advanced theory indicating that economic restructuring is being propagated and accelerated in part due to workers ideological distortions. The ideas that I have advanced show both the influence of macro- and meso-level structure on individual workers, yet also illustrate the power of individuals who not only are shaped by and reproduce that structure, but contribute to the impact of that structure. The notion that workers support the ideals of capitalism due to the hegemony of powerful elites is not new, but the idea that workers actively

embrace the ideology as an adaptation to the restructured economy is an extension of ideology theory particularly relevant to today's economic conditions and the contemporary sociology of work.

I also provided insight into the type of career outcomes that occur within the restructured economy. Initially, I defined career outcomes that have emerged as a result of economic restructuring as a sample criterion to assure participants with varying experiences. I then reassessed my original classification of outcomes during my analysis and provided a more accurate categorization. I then posited a theory of each career outcome based on the type of structure that is most influential on workers experiencing the outcome and the dominant personal resource that characterizes those in each outcome.

An additional contribution to the sociology of work is the idea that different career-tracks involve varying structure, particularly in the process of negotiating job transitions. I described this theory as career-track effects, which are relevant to understanding the processes involved in the reentry into the workforce of displaced employees. There is a component of age in career-track effects, making this idea pertinent to the study of aging workers as well.

By extensively situating career disruptions within an identity theory framework, I have provided a new foundation for symbolic-interactionist study of 21<sup>st</sup> century work. Two novel theories emerged from this study that contribute to this new perspective. First, I offer a new conceptualization of displaced workers as being in a defined transition role rather than simply moving from one work role to another. The transition role has characteristics that have not previously been considered because the role is different from other roles. Occupying the role is generally unanticipated, but the role immediately becomes highly salient in the individuals broader hierarchy of roles. This contrasts with other roles that are anticipated and the individual

has time to envision himself in the role and to anticipate the expectations of the role. Further, while the individual occupies the transition role, the self verification process is largely incongruous, leading to distress. Opportunities for self-enhancement or identity protection are negligible and are severely lacking in comparison to the previously occupied worker role. Other roles generally offer the ability of self-enhancement by verifying one's self-meanings with in-role situations and behavior. The transition role, then, is not only a role that has not previously been defined, it is a new type of role with unique characteristics.

Second, I extend the idea of personal resources as the cornerstone of new theory of identity maintenance for displaced workers. Specifically, I advance the notion that withdrawal from the workforce stems from a depletion of personal resources. I identify self-esteem, self-efficacy, and authenticity as the critical resources during transition and augment this theory with an examination of how these personal resources are accumulated and reduced. Further, I contextualize existing ideas of the process of identity control and the distress that results from failing to achieve self-verification in terms of the transition experience.

I have advanced new theory within an identity theory framework and applied identity theory to a comprehensive analysis of boomer professionals in the restructured economy. I have not only validated several key identity theory concepts in my analysis, I have also shown that these concepts form a cohesive explanatory framework as proposed by identity theorists. Arguably, by using grounded theory methods, this study provided further validation of identity theory. The culmination of these results, then, constitutes an extension of identity theory and provides a substantial contribution to this area of social psychology.

My research provided additional insight into aging, work motivations, and the desire for authenticity that have implications for life course sociology. Further, ideas developed regarding

stress that have broad sociological interest as well as specific applicability within the realm of medical sociology.

A key limitation in my research applies to all qualitative research in that the analysis is valid for the specific participants, but is not necessarily reliable from one group of participants to the next. A specific concern in this area regarding my research is lower than expected participation by individual contributors. CXO's and middle-managers are better represented according to how I anticipated the distribution of workers on these career-tracks.

There are two possibilities. First, individual contributors may represent a smaller proportion of the boomer professional workforce than expected. Individual contributor jobs have been downsized throughout the era of economic restructuring. Technology and offshore outsourcing have contributed to a steady decrease in the number of these jobs. Older knowledge-based workers, in the role of individual contributor, have also been primary targets for downsizing because of ageism or the perception that their training is outdated. There may simply be fewer individual contributors in the corporate ranks and, as a result, are less represented in my sample. Second, individual contributors are likely less skilled at networking and are perhaps reluctant to participate in networking activities. Because my chain-referral sampling method relied on interconnected networks, individual contributors may have been less accessible to my sampling technique. If this second situation occurred, then my sample is underrepresented by individual contributors and this limitation of the study should be noted.

Another limitation is personal biases that I brought to the analysis. As an analyst I took steps, either intentionally or unintentionally, that guided my analysis in the direction of identity theory. First, my interview guide framed questions about the meaning that individuals attach to certain aspects of their work. My questions were informed by identity theory because that is the

theoretical foundation that guided the development of my research questions. Second, I probed on issues of interest during the interviews. The areas that I probed are likely to align with my interest in identity theory. Third, I made decisions during the analysis, such as which indicators were important, how the indicators represented concepts and how the concepts were categorized, what were the themes that emerged from these categories, and what is the main story that surfaced from my analysis. Each of these decisions, perhaps as conscious choices or perhaps as inadvertent judgments, is likely to have been influenced by my knowledge and interest in identity theory. Working within the framework of identity theory had a substantive effect on my data collection and my analysis. Whether this is a significant limitation is debatable. The themes that emerged from my analysis aligned very well with identity theory. In my mind they were the important themes, but I recognize that I was predisposed to looking for identity theory themes. In either case, there are certainly biases that, I as a researcher, I brought to my research.

A third limitation is that the meanings that boomer professionals convey, those that are structural in origin, are largely the product of hegemony exerted by the U.S. power elite. Capitalist and corporate ideologies are structurally ingrained in the identities of workers and boomer professionals are particularly receptive because they perceive the system to have served them well. Meanings among this group are, to a large extent, simply reflections of the broader hegemony. While it is important to understand how they have internalized this ideology, my research design essentially assures that deeper meanings are difficult to obtain. A worker with false consciousness can only convey their perspective from that consciousness. As I argued, even authenticity is in large part structurally derived. My research, then, addresses only a subjective, socially constructed reality in which workers reify the very structure in which they are embedded. Perhaps that is all that is relevant, but if there is an objective perspective that

considers whether this reality is in the best interests of the participants, it is beyond the scope of my research.

### **Future Research and Implications**

How boomer professionals are responding to increasingly competitive labor markets and how they react to being downsized are vital social issues. The issues have never been more pertinent than they are today. It is these issues that I address by developing an understanding of boomer professionals in transition. Examining how they behave, and why they behave as they do, in the restructured economy is a crucial element in comprehending work in the current economy. The theory of transition role identities that I propose is one essential step in developing that understanding.

This theoretical proposition has particular value because it anticipates the behavior of the fastest growing segment of the labor force, boomer professionals. Further, boomer professional behavior may extend in some respects to other older workers and to other professionals. Worker behavior, of course, has significant social implications. I explore opportunities for future research in the area of work in the restructured economy below. I consider next steps both from the perspective of extending our knowledge of work and the standpoint of addressing the implications highlighted by my study.

This research was conducted with the goal of providing a comprehensive evaluation of the boomer professional experience within the restructured economy. At the beginning of the project, my initial assessment was that sufficient study had not occurred in this area due to the difficulty in obtaining data that adequately characterizes the displaced worker experience. My belief was that a necessary first step was to conduct a qualitative study that theoretically characterized the situation and developed assertions that could be subsequently tested. I have

endeavored to complete that initial qualitative investigation, which I believe is comprehensive in terms of addressing the process from beginning to end, and to present theory to be tested in future work.

In the course of completing my analysis it is clear that opportunities exist for additional relevant research applying both quantitative and qualitative methods, particularly testing the ideas that I have proposed. For example, the relationship between personal resources and distress is testable. Self-esteem has been measured and depression has been measured (Burke and Tully 1977; Longmore and DeMaris 1997; Mutran and George 1982; Radloff 1977). Extending work in these areas would serve to quantify these concepts and potentially strengthen the linkage between identity and behavior that has been extensively asserted (Stryker 1980; Burke and Reitzes 1981). The notion of personal resources as derived from structure is an intriguing idea that suggests a need for additional research. Measuring personal resources in varying structural conditions, either within the work arena, such as in different organizational cultures, or in other areas, would provide key insight into the direct ramifications of structural constraints on key components of identity.

My thoughts on next steps are addressed in the following five recommendations. First, while I made a foray into the effects of economic ideology and youth culture on boomer professionals, several areas require additional examination. One open question involves the extent, if any, that boomers and professionals vary in comparison to other cohorts and classes of workers. I have alluded to the possibility that boomers may depart from previous cohorts in terms of embracing a success ideology. They may also have gone further to adopt youthful age identities than previous generations. Further, my study does not provide any insight into younger cohorts from either an economic ideology or youthful age identity perspective because of a



limited sample. Both of these areas warrant studies that compare and contrast cohorts along these lines. Also, different groups require investigation. Blue collar workers, lower wage service workers, and vocational/technical workers are just some of the groups that are dramatically affected by the changing economy.

Second, a deeper investigation of the processes by which ideology reproduces itself and tends to become more powerful as more individuals internalize the ideals is also necessary within an identity theory framework. My theory suggests that identities are developed based on ideology and that self-meanings are inculcated with those ideas. Indications are that efforts by individuals to protect and enhance their sense of self given ideological self-meanings, and self-verifying against an identity standard defined in part by ideology, leads to a proliferation, perhaps nonlinearly, of the particular ideology. Research aimed at studying these processes could not only lead to a better understanding of ideology, but possibly identify how disruptions to these processes occur and how those disruptions apply to social movements and reductions in social inequality. Worker role identities are clearly controlled to a large extent by capitalist hegemony, but identity theory seems to offer insight into factors that may diminish this control.

Third, while I have introduced transition as a role that is becoming increasingly common in today's economy, ways that workers in transition can be aided remain to be examined. How can the stress associated with transition be reduced? What steps can be taken to help workers manage their personal resource reserves? How can outplacement services be improved such that the focus is more on the well-being of the worker and less on serving business interests? Are there interventions that defer or avoid identity loss in long-term periods of transition? Questions such as these must be addressed in order to translate knowledge of worker transition issues into preventive measures.

For example, distress is an unavoidable consequence of downsizing. When considered in the broader terms of reduced job security, the well-being of boomer professionals and workers in general would seem to be diminished in the restructured economy. The combination of aging and increased stress does not bode well for overall health and healthcare costs. Stress and depression, as well as the myriad disease processes that are stress-related, are likely to increase as health issues and place a strain on the healthcare system. I have suggested that the preservation of personal resources is important to maintaining one's sense of wellbeing, but there is a limit to the amount of distress that workers can withstand. Boomer professionals with a history of being self-efficacious may be unlikely to seek medical assistance for anxiety and depression. Unfavorable outcomes may increase and the problem may be exacerbated by a lack of awareness on the part of medical professionals.

Fourth, I identified self-esteem, self-efficacy, and authenticity as the critical personal resources in identity maintenance, but additional study is required to understand the variation in how these resources are managed. Some workers seem to use personal resources more efficiently, but the specific mechanisms by which this occurs remain to be investigated. A considerable body of work has been amassed that explores variation in the amount of these resources that individuals possess. However, understanding individual differences in the way that these resources are used could lead to new theories of self-motives and identity control that are relevant well beyond just worker role identities.

Fifth, my identification of career outcomes is limited. Larger samples would likely expand the classification of outcomes, providing additional breadth to this study. Targeted samples would provide additional granularity to the defined career outcomes. For example, some workers reinvent themselves while they remain employed while others withdraw from the

workforce in order to prepare for reentry in a different career. Additional understanding of the outcomes most often experienced by today's worker might also preface exploration into the relative rates that workers are pursuing various career outcomes. Further, a better understanding of the motivations for different career paths would provide important insight into the actions of workers in the restructured economy.

For example, because of strong work motivations and youthful age identities, workers may be expected to remain in the labor force beyond the traditional retirement age of 65. This is not a new projection, but it has been unclear how the labor market would accommodate the apparent surplus of workers. Boomers currently represent the largest segment of the workforce, suggesting that fewer retirements would act to maintain a stable number of workers in the labor market. However, recent history indicates that in the restructured economy, companies not only shed workers during economic downturns, they have also been downsizing in times of economic prosperity. Technology has enabled more work to be done with fewer workers and this phenomenon is no longer restricted to manufacturing and low-wage service sectors (Rifkin 1995; Zuboff 1988). Knowledge-based workers are being replaced by internet and software technology. Further, jobs that require knowledge-based workers are increasingly being outsourced offshore and companies have learned to operate with fewer layers of management as decisions are delegated to cross-functional teams and lower levels in the organization. Even with significant economic growth, there may not be sufficient jobs in the primary labor market to satisfy the number of people who want to work.

My research, however, suggests that a portion of boomer professionals with a desire to continue working do not wish to do so in traditional corporate jobs. Many are working independently in their own businesses, primarily sole proprietorships and LLC's. Some are

reinventing their careers with objectives to work outside of the corporate world (e.g., academia, non-profit organizations). Some are content to be underemployed and the number who are satisfied with this work arrangement may increase when they become eligible for Medicare benefits and no longer need to work to obtain healthcare coverage. Overall, the search for authenticity in their work tends to lead boomer professionals away from corporations. Certainly there are compatible trends between fewer corporate jobs for professionals and fewer boomer professionals wishing to work in a corporate environment.

It remains to be seen whether the trend away from corporate work for boomer professionals also involves a shift from primary to secondary labor markets. It is possible that more of these workers will find their niche in secondary labor markets, which implies lower pay and fewer benefits. Secondary labor markets may experience an infusion of older workers substantially changing the demographics of people working outside of the core economy.

Whether in primary or secondary labor markets, all indications are that a particularly vibrant group of older workers have set their sights on remaining valuable contributors to society through their work. They are likely to be more creative, more authentic, in defining what constitutes valuable contributions, but they expect to make their presence felt. The lessons that boomer professionals are learning in experiences with transitions may serve them well in searching for jobs in which they feel they can make an authentic contribution and obtain the fulfillment that they seek.

In stark contrast, there seems to be a smaller, but significant, group of boomer professionals who are in danger of no longer participating in the labor market and continuing a downward spiral as a result. Workers who are unable to find their niche in the labor market in spite of a desire to continue working may become frustrated, which may make identity

maintenance more difficult and accelerate the depletion of personal resources. More workers may fail to stay motivated and fall from the ranks of those who are fulfilled by work. Workers who lose their identity and become depressed will be marginalized and face an uncertain future. Some of these downwardly mobile boomer professionals may move into lower paying non-professional jobs, but the number of these jobs that are available is finite and lower status workers may consequently be denied opportunities. In sufficient numbers this could add to existing social problems that stem from inequality and poverty. In any case, a bifurcated population of aging professionals may arise, those who are able to maintain their vitality through work and those who can not.

### **Final Points**

These final points contextualize my research within a broader sociological perspective, beginning with a discussion of the negative implications of economic restructuring for the upper-middle strata of class in the United States. The lower limit of the upper quintile, the top 20 percent, in terms of household income is approximately \$90,000. Households in this quintile hold about 84 percent of U.S. wealth. More boomer professionals fall into this quintile than any of the lower quintiles. This quintile represents the upper middle class and boomer professionals are disproportionately members of this economic class. If we classified those who have attained the American dream, boomer professionals would constitute a significant share of those who had “made it.” These workers would have to be considered successful by most any measure. They are educated and they have high prestige occupations in addition to earning more and being generally wealthier than those in the lower quintiles. In comparison to other classes of workers, boomer professionals largely have a higher standard of living. Yet, there are signs of an erosion of the prosperity that this group has enjoyed.

My results indicate a general shift of boomer professionals away from corporations and the salaries and benefits that are associated with larger companies in the core economy. Whether the shift is the result of corporate motives and ageism or individuals' search for authenticity, the consequence is that fewer boomer professionals are expected to continue to earn at levels commensurate with the earning power that they had at the peak of their career. It is likely that, looking forward, professionals obtain a decreasing share of economic activity (e.g., profits).

Some of this shift will involve younger workers whose proportionate share of earnings increases as they assume some of the responsibility that was formerly held by boomer professionals. However, another component of this shift is that a portion of the economic activity forfeited by boomer professionals will accrue to members of the wealthier strata. In this sense, indications are that an erosion of the upper middle class, which is heavily represented by boomer professionals, is likely. We have experienced an erosion of the middle class that has resulted in higher levels of inequality during the era of restructuring and that trend may continue with the upper middle class being affected. While this possibility did not hold meaning for the participants in my study, it is nonetheless a serious concern for social inequality scholars.

In general, boomer professionals who remain in traditional corporate jobs are working longer and harder for a smaller share of the economic pie. Inequality has increased throughout the era of economic restructuring as income and wealth have shifted from the lower classes to the upper classes. In earlier times in the restructured economy some of this economic redistribution benefited boomer professionals who were educated and in demand. Now, however, boomer professionals, while generally still well-off, are beginning to experience the negative consequences of economic restructuring.

Economic restructuring is continuing unabated and, arguably, gaining strength. While quantifying economic restructuring is beyond the scope of my research, there are two numbers that provide a quantitative sense of how workers are affected by economic restructuring. First, during the era of restructuring the percentage of gross domestic product (GDP) that is paid in wages has decreased from 53.5 percent in 1970 to 45.5 percent in 2006 (U.S. Department of Commerce). This steady decline indicates that workers, overall, receive an eight percent lesser share of the economic pie over the time period marked by economic restructuring. During the same time, productivity, the economic output per worker, has increased from an average annual growth of 1.1 percent in the 1970s to 2.5 percent in the 2000s (U.S. Bureau of Labor Statistics). More recently, productivity was 6.9 percent in the 2<sup>nd</sup> quarter of 2009 and 9.5 percent in the 3<sup>rd</sup> quarter of 2009 (Hilsenrath and Di Leo 2009). At this point in the era of economic restructuring, workers are producing more in exchange for a smaller economic share.

Boomer professionals, however, do not see the problem. Yet, indications are that this group is no longer the beneficiary of increasing inequality, but a victim (as was previously the case with the working class and the middle class). Older workers are more frequently downsized and take longer to reenter the ranks of the actively working. The increased time spent out of work reduces corporate payrolls (i.e., expenses) and often shifts capital from savings to consumer spending as downsized workers draw on their investments for income. Lower corporate expenses and funds transferred from savings to economic activity both disproportionately accrue to profits. Corporate officers and large stockholders benefit.

This phenomenon is exaggerated when older workers withdraw from the workforce. They alleviate corporate expenses, draw heavily on their savings, and quietly adjust their standard of living downward. They do not get noticed. For example, they are not counted as unemployed

because they have not recently attempted to find work. Without being reflected in unemployment statistics, government has no incentive to take action. Boomer professionals drop out of the labor market and they go unnoticed. They fly below the radar and no one recognizes the need for action.

Boomer professionals do not raise the issue as being a social problem. As I have shown, they are blinded by ideology. Further, they are too busy struggling to maintain or resume their careers to notice. Advancing inequality erodes their prosperity, but no alarm is sounded. So, where does it stop? Laissez-faire economic policies do not seem to provide the answer. Free markets, left to follow their own invisible hand, will continue to exploit accelerating economic restructuring. Short of a return to competitive labor markets, economic restructuring will continue unchecked.

Current circumstances do not suggest a future where companies compete for workers. The U.S. economy is expanding, following a relatively short recession, yet unemployment continues to grow. Today's standard unemployment rate is 10.2 percent and if discouraged workers are counted the rate is 17.5 percent. These numbers are the highest since unemployment statistics were kept and likely are the highest since the Great Depression (Leonhardt 2009). More than one in six workers who would like to work does not have a job. These numbers do not appear poised to drop considering that GDP is growing, productivity is increasing, and technology, reengineering, and outsourcing continue to undergird job reductions.

Unemployment statistics understate the unemployment problem in another way. If one in six workers is out of job at any given point in time, there are surely many other workers who will be affected over any specific period of time. For a simple hypothetical example, if the average length of unemployment is six months, then, with a 17.5 percent unemployment rate, it is



probable that 67 percent of employees will experience unemployment during the next two years. That is two out of every three workers would have their careers and incomes interrupted for six months out of a 24 month period, effectively reducing their income by 25 percent.<sup>18</sup> This is an issue of churn. The magnitude of the problem, its effect on income, careers, wealth, and stress is understated dramatically by static data such as the unemployment rate. The impact of downsizing and periods of transition on workers can be substantial and is not accurately conveyed by the typical numbers that economists use to inform the public.

Workers taking action to address the issue would help. Government is not going to reign in free-market capitalism unless it becomes an urgent political issue that resonates with voters. Given that boomer professionals, a relatively well-educated group of workers, are not fully cognizant of even the personal ramifications of economic restructuring, identification with the issue by the masses is unlikely. The vicious cycle of ideology distorting workers views to a point where they accept being exploited and then work harder to cope with the consequences of exploitation seems destined to continue. Without some significant social movement, economic restructuring will gain power, inequality will continue to increase, and workers will become more marginalized.

Educating workers to understand the relationship between economic restructuring and the ways that they are marginalized seems a logical first step. An organization along the lines of AARP could provide this function. However, ultimately such an organization is embedded in a capitalist system and must tailor its message to the need for fundraising, limiting its long-term effectiveness.

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<sup>18</sup> This simple example is not intended to estimate reality for boomer professional unemployment, but to illustrate the issue of churn.

Public policy, including economic intervention is also necessary. Income as a percentage of GDP cannot be left to free-market forces with no ceiling and no floor. Profits cannot accrue only to the wealthy without regard for the welfare of lower class workers. Regulation is necessary to curtail the self-destructive tendencies of free-market capitalism. Based on my research capitalism is not sowing the seeds of its own destruction because workers are likely to revolt, but because workers who realize that they are unfulfilled will become ineffective. They need work to provide the personal resources, self-esteem, self-efficacy, and authenticity, that are necessary to maintain an identity that results in positive outcomes, outcomes that benefit the individual, society, and the country.

In the case of boomer professionals, government must choose between free-market capitalism and protecting a group of workers who aspired to the American dream. They are educated. They work hard. On the basis of merit, they would be upwardly mobile, but, instead, they are facing downward mobility due to economic restructuring. I do not expect the United States to remain the top economic power in the world without workers believing that they can achieve the American dream. At some point, government is responsible for creating an environment that functions both economically and culturally.

In economic terms, scarcity or paucity refers to the need for economic compromises necessitated because society cannot provide for all of the needs and wants of individuals. Certainly, the U.S. government cannot fulfill all human needs. However, failing to provide for basic needs such as fulfillment through work is likely to be problematic. In the United States, the lowest quintile lives near or below the poverty line. The second and third lowest quintiles have been decimated by good manufacturing jobs being replaced by low-wage service jobs. The upper two quintiles have now been impacted by large-scale reduction in middle-management jobs.

Technology and automation have eliminated jobs at all income levels. In general, jobs have been eliminated with no expectation that they will return. Only the upper class, perhaps the top 5 percent, is positively affected. The U.S. economy appears to be moving forward with less dependence on labor. But, can the country manage to do so without the fulfillment that work provides? Scarcity of this type would seem to have the potential to erode the foundation of a country founded on life, liberty, and particularly, the pursuit of happiness, a country with meritocracy as one of its core values.

The issue is not limited to longer-term cultural and economic issues. There are real costs associated with economic restructuring today. Unemployment benefits subsidize workers who are affected by downsizing in the restructured economy, currently providing 39 weeks of income at levels varying by state. This cost is covered by employers, in the form of unemployment insurance, state and federal government. The medical costs associated with stress and depression are also real costs associated with economic restructuring today. These costs are borne by the healthcare system, employees, and employers.<sup>19</sup>

The social costs of economic restructuring raises the issue of corporate responsibility. Corporations are given special rights by society that grants them protection from individual liability. Yet, during the era of economic restructuring, the decisions made by those who receive that protection have led to unchecked downsizing and the cumulative distress that downsizing entails. If corporations are afforded protection from liability as a social benefit and their actions are a detriment to society, then it seems to be an abuse that should be questioned. There is a tangible cost associated with anxiety and depression that has increased dramatically during the restructuring of the economy. Corporations, however, do not bear the costs. In fact, they have

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<sup>19</sup> Even when rising healthcare costs are added to the cost of labor as a percentage of GDP, the combined cost of labor and healthcare has declined during the era of economic restructuring. From this perspective, I suggest that corporations have not borne any of the increased cost of healthcare (U.S. Department of Commerce).

acted to shed much of the cost as employees pay increasing percentages of their healthcare costs and many companies are shifting away from providing healthcare. Boomer professionals may not be cognizant of the paradox, but they are certainly paying the price.

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## **APPENDIX I – INTERVIEW DETAILS**

### **Interview Contents**

- I. Biographical questions
  - a. Current work situation
  - b. Career
- II. Questions about the importance of work
- III. Questions about how economic and workplace restructuring are perceived
  - a. How has restructuring affected you personally?
  - b. How has restructuring impacted your current work situation?
- IV. Questions about how aging is perceived
- V. Questions about age-related self-meanings
- VI. Questions about work-related self-meanings
- VII. Questions about behavior in current work situation
- VIII. Questions about stress and life satisfaction

Probe when self-meanings don't align with behavior in work situation

- a. How are conflicts resolved?
- b. Does it cause stress or anxiety?

Probe on anything that seems like role-making

Probe on anything that seems like past meanings affecting current meanings

### **Recruiting Synopsis**

I am a PhD candidate who is pursuing a doctorate in Sociology after thirty years in the business world. I am primarily interested in the sociology of work and social psychology, which I have integrated in a dissertation proposal that I am now ready to conduct. The title is "Identity Work for 'Boomer' Professionals." My objective is to develop a qualitative understanding of how baby boomers respond to the combined forces of aging and a restructured (globalized) economy. I am currently working to identify workers who have encountered an unplanned disruption in their career trajectory, after the age of 40, as the result of workplace restructuring (e.g., downsizing, outsourcing, mergers and acquisitions), or aging, and who are willing to share their experience. I am interested in workers who responded by resuming their career with another company, or a different position or relationship with the same company, as well as workers who chose new career paths through self-employment, retraining, or other means. Workers who took proactive steps because of perceived or potential issues with aging or restructuring, changing their work situation as a result, are also of interest.

I will be interviewing between 30 and 40 professionals from the baby-boom generation (aged 45-62) that are involved in different work situations. The interview will be as confidential as possible. During the interview we will select an alias for you that will be used for all future references to the interview and its contents; only I will know your true identity and I take your confidentiality seriously. The interview will be loosely structured with open-ended questions aimed at exploring your experiences as a boomer professional. I will probe further when I feel

that I need a deeper understanding of your actions or feelings. The interview is completely consensual and you can always choose not to answer any questions that are uncomfortable. You can end the interview at any time. I plan to record the interview with a voice recorder so that I can focus on your comments rather than taking notes. The file will be labeled only with your alias. The interview will take between an hour and a half and two hours at the time and location of your choice.

The research will initially be documented in my dissertation, which I expect to finish in the spring of 2009. I hope the research will also lead to two or three articles published in academic journals. My main goal, however is to write a book on the subject using data from the interviews. In addition to these material objectives, I also hope to give voice to boomer workers who have been affected by workplace change and those who are effecting workplace change.

## **Interview Guide**

### **I. Biography**

**Okay, let's establish a level of trust right from the beginning. How old are you?**

**Please give me an overview of your professional career.**

Probe

- a. Positive or negative feelings associated with work
- b. Perceived downward mobility
- c. The relative importance of work

**Now, in your current situation, what are you doing and how is that going?**

Probe

- a. Indications of meaning associated with current situation
- b. Signs of stress or conflict

**How would you describe your satisfaction with your current situation?**

Probe

- a. Areas of dissatisfaction
- b. Changes in degree of satisfaction
- c. Issues related to restructuring
- d. Issues related to age
- e. How past roles, jobs, successes and failures play into the current situation

**What is the most challenging aspect of your current situation? How have you dealt with the challenge?**

Probe

- a. Any area of difficulty not fully articulated
- b. Any age related challenges

- c. Any challenges for which the blame seems directed at broader structure
- d. Whether respondent meets challenges differently now than earlier in career
- e. Challenges related to a loss of self-esteem, self-efficacy, or authenticity

## **II. Importance of Work**

### **What do you enjoy the most about your current work situation?**

Probe

- a. Is the most enjoyable aspect related to agency, self-esteem, self-efficacy, or authenticity

### **How would you describe the importance of work in your life?**

Probe

- a. Go beyond “I work to survive” response

### **Has your sense of how important work is to you changed much over the years?**

Probe

- a. Any changes in importance related to age or restructuring

## **III. Perceptions of Economic and Workplace Restructuring**

### **As you know, work has changed dramatically during the last twenty-five years or so. Thinking about the changes that you have noticed, what is your reaction to those changes?**

Probe

- a. Thoughts related to globalization (what does globalization mean to you?)
- b. Anything that can be related to tactical workplace restructuring (i.e., downsizing, employment externalization, contingent work, reengineering, M&As, deskilling, etc.

If globalization isn't mentioned:

How do you view the effects on work that have occurred due to globalization?

If downsizing isn't mentioned:

How do you feel about downsizing? Is it a necessary evil for companies to survive or should companies be more loyal to their employees?

### **Have you personally been affected by any of these changes and, if so, how?**

Probe

- a. Any indications related to an identity change or change in self-esteem, self-efficacy, or authenticity

**Thinking about your current work situation, how does it relate to these broader economic changes?**

**Is your current work situation affected by changes that have occurred in the workplace due to broader economic changes in the economy during the last quarter-century?**

If applicable, ask:

Have these changes contributed to your work situation?

If common workplace tactics aren't mentioned:

As you know companies have resorted to different tactics, ostensibly to be more competitive, during the last 25 years. These include downsizing, outsourcing, temporary and part-time workers, reengineering, M&As, and deskilling. Have any of these tactics contributed to or affected your current work situation?

Probe

- a. Any linkages to economic or workplace restructuring
- b. Any points of dissatisfaction due to restructuring

**How much control do you feel that you have over your current work situation?**

Probe

- a. Can you change your actions at work to make the job more to your liking?
- b. What are the consequences of changing your behavior at work?

#### **IV. Perceptions of Aging**

**Changing directions for a moment, how would you describe your feelings about growing older as a worker?**

**What specifically is the most difficult about becoming an older worker?**

Probe

- a. Any changes in identity meanings or self-investments

**What aging challenges have you personally faced?**

If age discrimination is not mentioned, ask:

Have you experienced any circumstances that you felt were discriminatory on the basis of age?

Probe

- a. Level of training received
- b. Perceived importance of assignments received
- c. Perceived importance to the organization

#### **V. Age-Related Self-Meanings**

**As an older worker, how would you describe yourself?**

Probe

- a. Any aspect that hints at age as a detriment
- b. Any perception that they've gotten better with age

**Think about yourself as a younger worker. How have you changed?**

Probe

- a. How experiences as a younger worker affect being an older worker

## **VI. Work-Related Self-Meanings**

**Forgetting about age for the moment, describe yourself as a worker. What is it like to be you as a worker?**

If respondent struggles to answer:

What is important to you as a worker?

What do you value in the work experience?

What does work mean to you?

**What is the one word you would use to describe yourself as a worker?**

**What is the one word you would use to describe what you are not as a worker?**

**Do you see yourself as being a certain type of worker?**

**Do you see yourself as not being a certain type of worker?**

**Thinking about your answers to these last few questions, do you see yourself differently now as opposed to when you were younger? How has your perception of yourself changed?**

**How do you think others perceive you as a worker?**

Do you agree or disagree with this characterization?

## **VII. Current Work-Situation Behavior**

**In your current work situation, are you the type of worker that you have described? In what ways?**

Probe

- a. Any mention of a difference between the worker that they see themselves as and the worker they are in their current situation.

How do you resolve this apparent contradiction?  
What one word would you use to describe the way this contradiction makes you feel?  
Is the difference (contradiction) a source of frustration, anxiety, stress?

**Are you the type of worker that you want to be? In what ways?**

**What's the best part of your typical work day? Why?**

**What's the worst part of your typical work day? Why?**

### **VIII. Work and Life Satisfaction**

**Overall, as an older worker, are there any particular things that you worry about or that cause you stress?**

**How would you describe how satisfied you are with you life, overall, at this point?**

**How does your age affect your overall satisfaction with your life? How big a part does your age play in your overall satisfaction?**

**How satisfied are you with your life as an older worker?**

**How big a part does your level of satisfaction with your work-life play in your overall satisfaction?**

**Do you have a preference for your alias?**

Probe

a. Any area worth following up on

## APPENDIX II – INFORMED CONSENT FORM

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Georgia State University  
Department of Sociology

### *Informed Consent*

Title: Identity Work for “Boomer” Professionals

Principal Investigator: Lesley W. Reid, P.I.  
Jim Baird, Student P.I.

#### I. Purpose:

You are invited to participate in a research study. The purpose of the study is to investigate how boomer professionals respond to workplace change and aging in the workplace. You are invited to participate because you are a boomer professional in a relevant work situation. A total of 30 to 40 participants will be recruited for this study. Participation will require up to two hours of your time for a single interview.

#### II. Procedures:

If you decide to participate, you will be asked in-depth questions about your work, past and present, particularly your feelings about work in which you have been involved. You will be asked about how you feel about yourself with regard to your work and your behavior in your specific work situation. You may choose not to answer a specific question at any time.

I will personally conduct the interview. You will not be required to have contact with anyone else as part of this study. I will record our interview, but will not associate your real name with the recording to protect your privacy. You will be identified only with an alias and only I will know your real name.

The interview will consist of open-ended questions where you will respond with an answer that is as long or short as you feel appropriate. Your response should reflect what is important to you in addressing the question. I will dig deeper into your responses where I think doing so will enhance my research.

The interview will be conducted at the time and location of your choice during the Fall of 2008. I expect to complete the research as a formal dissertation in early 2009. After that, I hope to publish the results in an academic book.

#### III. Risks:

In this study, you will not have any more risks than you would in a normal day of life.

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IV. Benefits:

Participation in this study may not benefit you personally. Overall, we hope to gain information about boomer professionals in today's economy that benefits society by adding to our knowledge in this area, and potentially informs public policy.

V. Voluntary Participation and Withdrawal:

Participation in this research is voluntary. You do not have to be in this study. If you decide to be in the study and change your mind, you have the right to drop out at any time. You may skip questions or stop participating at any time. Whatever you decide, there will not be any negative consequences.

VI. Confidentiality:

We will keep your records private to the extent allowed by law. We will use an alias rather than your name on study records. Only I will have access to your real name, which I will keep in a locked cabinet separate from the data acquired in this study to protect your privacy. Your name and other facts that might point to you will not appear when we present this study or publish its results. The findings will be summarized and reported in group form. You will not be identified personally. Research personnel, including other sociologists and transcribers will have access to the information you provide, but you will not be identified. Audio recordings will not identify you by your real name and they will be stored on password- and firewall-protected computers.

VII. Contact Persons:

Call Jim Baird at 770-730-5792 or [gjbaird@gmail.com](mailto:gjbaird@gmail.com) or Lesley Reid at 404-413-6521 or [soclw@langate.gsu.edu](mailto:soclw@langate.gsu.edu) if you have questions about this study. If you have questions or concerns about your rights as a participant in this research study, you may contact Susan Vogtner in the Office of Research Integrity at 404-413-3513 or [svogtner1@gsu.edu](mailto:svogtner1@gsu.edu).

VIII. Copy of Consent Form to Subject:

We will give you a copy of this consent form to keep.

If you are willing to volunteer for this research and be audio recorded, please sign below.

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Participant

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Date

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Principal Investigator or Researcher Obtaining Consent

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Date