Setting the Stage and Generativity One

William Bergquist and Gary Quehl

In essence, we are all actors living on the stage of life--a common metaphor used by many writers, including William Shakespeare. Yet it continues to be a useful metaphor, given what many of us experience on a daily basis as mature adults. We live on a stage populated by many actors – all of whom represent aspects of ourselves, playing many different roles assigned to us by society, genes, and our own proclivities.

This state of affairs was noted with particular insight by Erik Erikson as he moved to psychology from a career in theater. According to Erikson, we are primarily playing out one of eight roles (dramas, scripts) at a particular point in our life. However, the other seven role-players are also on stage. They influence and often are in dialogue with the featured player, and on occasion share a spotlight with the featured player.

The eight roles are identified by Erikson (1963) as *trust, autonomy, initiative, industry, identity, intimacy, generativity and ego-integrity.* Many of these roles have received extensive attention by Erikson and his followers, but the seventh role (generativity) has received relatively little notice. We believe it is important to explore and write about generativity because it potentially is in the spotlight for many women and men in contemporary Western societies, and perhaps societies elsewhere in the world.

As already noted, we wish to offer an expanded perspective on generativity that goes beyond Erikson's initial description. We see that generativity actually is played out in *four* roles--not one. Each of these roles requires the actor to step into the spotlight at one or more specific times during the life play. As we enter the final stage of our life, these four roles of generativity often interweave in exceptionally complex and marvelous ways—and they are ways that can be enhanced by the insights and guidance provided by a profession coach.

The Cast

Having outlined the roles to be engaged in this play about generativity, it is time to further set the stage by introducing the men and women to whom we turn for insights and narratives about generativity and deep caring.

Consulting With and Coaching Mid-Life Clients

Our first source of narratives and insights come from the men and women with whom we have interacted over the past 30 years in our work as consultants and coaches to individuals and organizations. Our clients have told us a great deal about their own lives and the challenges they face.

While we hope to have been of use to these men and woman (who are usually in their 40s, 50s, and 60s), we also have learned much from them as gifted and insightful leaders, innovators, and creators. We have drawn extensively in this set of essays from them. Some of these narratives are reported in three books and articles we have written: *In Our Fifties* (Bergquist, Klaum and Greenberg,), *Men of Autumn* (Bergquist,2012) and *The Social and Cultural Characteristics of Generational Age Groups* (Quehl, 2012)

The Sage Leadership Project

We turn second to a group of 100 men and women who were interviewed in conjunction with a two-year project about the civic lives of 50 emerging sage leaders (age 25-55) and 50 senior sage leaders (age 56-90)

living in Grass Valley and Nevada City, California. It was the concept of intergenerational Sage-ing that inspired the governing board of the Center for Nonprofit Leadership (the California Western Nevada County umbrella service organization for nonprofits) to conduct in-depth interviews with each of the 100 sage leaders.

Results from this project were reported in a book published by the Center for Nonprofit Leadership in January of 2012 and co-authored by the two of us (*Sages Among Us: Harnessing the Power of Civic Engagement*) (Quehl and Bergquist, 2012). We make use of this interview data primarily with regard to the second, third and fourth roles of generativity.

The Enduring Couples Project

Our third source of insights and narratives is a project conducted over a twenty-year period with men and women who have been together in an intimate relationship for many years (usually at least fifteen). While most studies about the keys to successful marriages (and more broadly, successful intimate relationships) have been conducted by marriage and family therapists who extract lessons from couples who are not successfully engaged in an enduring relationship, the project on which we base work in the present series of essays focused on lessons learned from couples who have found ways to forge and sustain a long-term commitment.

Sponsored by the Professional School of Psychology, this project yielded interviews conducted with 80 couples and a series of essays on enduring intimate relationships that have been published in the Library of Professional Psychology. We make use of these interview data primarily regarding the first generativity role: raising children and initiating projects. With our focus on coaching in this series of essays, we will look primarily at the way individuals—and couples—engage in the generativity associated with conducting a project.

The Featured Players

Two women and two men were especially selected from among those participating in the Sage leadership project to play featured roles in the current set of essays. They are each amazing senior adult leaders who have had long and full lives and have engaged extensively in each of the four roles of generativity. These *Featured Players* are Daniel Weinberg, Dale Richards, Sally Johnson, and Lisa Underwood. We wish to introduce you to all four of our *Featured Players*. We have taken care to disguise them by name and personal history—except for the actual lessons they report having learned during each of the four generative stages.

Daniel Weinberg

A native of Burlington, Vermont, Dan was raised by a single mother after his father was killed in the South Pacific during WWII. He graduated with a BS degree in physics from a prestigious Ivy League university in New York State and also was in the naval reserve there. Dan was called-up during the Vietnam War, where he served as an Ensign on two aircraft carriers. His marriage failed during this period, and his ex-wife moved with their young son and daughter to her childhood home in Santa Barbara, California.

Estranged from his ex-wife and children, Dan decided to pursue graduate studies at a private university in Southern California, where he earned his Ph. D. in physics in 1971. He so impressed his major professors that Dan was invited to join the graduate faculty of the university as an assistant professor of physics. He then remarried and had a son with his new wife, who was a young assistant professor of English at the

university. Over a period of 13 years, Dan quickly moved through the professorial ranks and established a stellar reputation in physics research. This led him to being appointed Provost of the university and, ultimately, its president. After serving as university president for 18 years, Dan and his wife decided to retire in Northern California.

Avid fly fishermen and outdoor enthusiasts, Dan and his wife moved to Grass Valley, California, in 1993. There Dan discovered the nonprofit world and served with distinction as board president of an environmental organization and then a healthcare nonprofit. Due to his background in higher education and nonprofit leadership, he was invited to become part of the Center for Nonprofit Leadership Sage Leadership Project. He became a member of the ten-person team who interviewed the 100 sage community leaders. Dan recently celebrated his 78th birthday and 35th wedding anniversary. He and his wife make frequent visits to Utah and Wyoming to be with their three grandchildren.

Dale Richards

Dale is a native of Springfield, Missouri. He attended a major private university in St. Louis and graduated with a BS degree in electrical engineering. Dale initially worked in the aircraft industry in St. Louis and received a deferment from military service during the Vietnam War. He married his childhood sweetheart, and they settled in New Jersey, where he began a swift rise in the telecommunications industry. Dale and his wife parented two children, but they divorced in 1972. Dale's advancement through senior positions in New Jersey resulted in frequent moves across the country (Chicago, San Francisco), during which he met his present wife. Before retiring in 1990, Dale earned national recognition for the many patents he had developed during his telecommunications career.

Their love of Northern California, where Dale and his second wife vacationed for many years, led the couple to decide on Grass Valley as their retirement home. Because he was always involved in civic organizations during his professional career (e.g., twice chairing the national United Way Campaign for his company), Dale naturally took to volunteering for various nonprofit organizations in Grass Valley and Nevada City. He also routinely offered *pro bono* services to many of the region's nonprofit organizations and, in 2011, was invited by the Center for Nonprofit Leadership to join the ten-person team who were to interview 100 community Sage leaders. Dale recently celebrated his 78th birthday and 25th wedding anniversary. He and his wife continue to enjoy many visits with their five grandchildren in the Midwest.

Sally Johnson

Sally is a native of Ft. Lauderdale, Florida, and she attended a reputable Southern liberal arts college where she graduated with a BA in sociology; it's also where she met her husband. After graduation Sally and her husband sought careers in Washington, DC; in time, Sally became a major fund raiser for the National Republican Party. She then served as a senior White House adviser in Richard Nixon's White House. During this period Sally and her husband parented a son and daughter, and both became involved in anti-Vietnam War protests. Fatigued by the hubris of Washington, DC, politics, Sally and her husband moved to Los Angeles, and she established a nonprofit organization that served under-privileged children. Over time her innovation and leadership attracted the attention of the Mayor of Los Angeles, and she was awarded "Citizen of the Year" recognition in 1992.

When it came time for both Sally and her husband to retire in 1998, they visited a number of small rural communities and decided that Nevada City, California, was a perfect fit. Given her background in serving under-privileged children, Sally was invited to join several nonprofit boards, where her reputation for wise

leadership prospered. Indeed, she was awarded for her community service in 2010 by being recognized as Western Nevada County Nonprofit Citizen of the Year. This led to the Center for Nonprofit Leadership inviting Sally to become one of the ten-person team who interviewed the 100 community Sage leaders. Sally is now 74, and she and her husband recently celebrated their 55th wedding anniversary. They make frequent visits with their three grandchildren, all of whom live in Dallas, Texas.

Lisa Underwood

While she grew-up in Cedar Rapids, Michigan, Lisa decided to attend a major public university in Texas, where she graduated with a BA degree in psychology. Her marriage at an early age resulted in a male child but ended in divorce. She had the additional burden of having to care for a very ill mother for almost 45 years and serve as a guardian for her disabled nephew. After her divorce, Lisa moved with her mother and son to a Midwest city; she earned both her MFT master's degree license and Ph. D. in clinical psychology at a major public university. After completing her 3,000 hours of supervision, Lisa and her mother and son moved to Boston, Massachusetts. Over the years Lisa established a very successful therapy practice and wrote many books on the psychology of women. This attracted the attention of her national professional organization, which she served as a board member for 12 years.

When her mother died in 2005, Lisa decided to move to the warmer climate of Northern California. She lived in Redding for three years but decided to retire to Nevada City and the ski slopes of Lake Tahoe. Lisa very quickly became sought after as a speaker and seminar leader for the Center of Nonprofit Leadership. She was invited to become part of the ten-person interview team of the community Sage Leadership Project. Now fully retired at age 70, Lisa occasionally provides *pro bono* services in helping Western Nevada County nonprofit governing boards to strengthen their missions and their capacity for public accountability.

The Preconditions for Deep Caring

We have now set the stage by introducing the fundamental theme of our play: *deep caring*. We have identified the four roles of generativity and have identified the cast members who not only are providing the action but are also providing much of the script. We have also acquainted you with our four *Featured Players*. One more task needs to be completed in setting the stage. We want to provide a preliminary backdrop for this generativity play. What is required for someone to be generative? How do we engage in deep caring? And where might a professional coach be of value?

Competency

We specifically propose that deep caring requires the capacity to see our complex, unpredictable and turbulent world from several different perspectives. It also requires the willingness to act courageously midst this complexity, unpredictability and turbulence. To understand how this capacity and willingness unfold, we turn to the remarkably insightful work done by William Perry (1998) concerning cognitive and ethical development. Perry conceived of a four-stage developmental process that leads to an increasingly sophisticated epistemological (knowledge-based) stance. He identifies the first stage as *Dualism* – the tendency of some men and women to place everything into one or two categories: true/false, good/bad, honesty/dishonesty, etc. This dualistic stage often remains intact for many men and women as they mature, leaving them cognitively inflexible and often unable to generate much empathy or caring toward those people who are different from themselves in terms of race, ethnicity, political attitudes, abilities and disabilities.

These are the people who tend to stagnate later in life, finding it impossible or undesirable to support and encourage the younger generation (*Generativity Two*) or to provide support and encouragement to members of their community and the activities that nurture this community (*Generativity Four*). If they are active at all in their community, it is likely to be focused on a "special interest" project that is narrow in scope and often self-serving. While they may be interested in the preservation of traditions and heritage (*Generativity Three*), it is often at the expense of alternative traditions and heritages established by people different from themselves. The third role of generativity among those who are *Dualists* tends to be destructive and either short-lived or enforced through violence and repression (as in "Generativity" Three of the Third Reich).

Perry proposes that *Dualism* will often give way to what he calls the stage of *Multiplicity*. In this stage of cognitive flexibility, a man or woman is likely to recognize that there are alternative claims to truth, goodness, and morality. However, in a variant on the dualistic perspective, they may also conclude that if there is no one truth, sense of goodness or moral stance, then anything goes! When this happens, they tend not to trust any authority, since there is no one reliable source. They look to power ("Might makes right") and expedience ("I will do what will advance my career and life."). We are reminded of the 1960s in the United States, where multiplicity reigned among many young and old adults. Men and women of multiplicity show few signs of generativity. It is unfortunate if they are raising children, for they are likely to be inconsistent role models and callous in "caring" for their children. While dualists are likely to be harsh, but consistent parents (Generativity One), the multiplist parent is likely to be indifferent.

From multiplicity a maturing man or woman will often, according to Perry, move to greater cognitive flexibility once confronted with the complex patterns of life. They begin to see consistency in specific societies and cultures. They become convinced there are better ideas and more consistent values existing within specific communities. Perry identifies these people as *Relativists*. They recognize the differences among people in their lives, and they can appreciate and seek to understand these differences. These men and women are likely to be caring and thoughtful mentors and organizational leaders (*Generativity Two*), finding a way to encourage and support younger men and women or those with less experience who are different in some way from themselves. They engage different styles of mentoring and leadership when addressing the increasingly diverse workforce to be found in contemporary organizations.

Perry's relativists are also likely to be more successful than their dualist and multiplist colleagues in serving the Generativity Three role. They embrace their own heritage—but are also able to recognize the value inherent in other heritages. As Catholics, for example, they see the value of a vibrant Protestant Church, Jewish Synagogue and Muslim Mosque in their community. As a straight man or women celebrating the sacred nature of marriage, they honor the decision of their gay and lesbian neighbors to seek out a similarly sacred commitment to another person through marriage. Relativists are also men and women who actively engage in activities that benefit their community (*Generativity Four*).

Perry suggests there is a fourth stage of cognitive flexibility that can produce even stronger and sustained motivation to enact generativity. He identifies this fourth stage as *Commitment-in-relativism*. At this stage, a generative person not only recognizes the value of alternative truths, value judgments, and moral compasses if they are coherently enacted within a specific community; they also possess a strong and sustained commitment to a specific set of truths, judgments and moral compasses of their own. They act upon these commitments rather than just supporting them or encouraging others who share their perspectives. It is this

fourth stage that enables a full expression of deep caring. Again, *generativity and deep caring is about actions and deeds--not just words and feelings.*

There is one other important point to be made—a point that is often overlooked in the description of Perry's four stages. In the process of shifting from one stage to a more "advanced" stage there is an attendant grieving which must be acknowledged and addressed. Each movement to the next stage is "being kicked out of Eden." We lose our innocence about absolute truth and goodness. We are forced to take a stand even when competing interests and values pull us in multiple directions.

We mourn the loss and are inclined to move back to the previous stage (which is never really possible). Along comes a professional coach. This person can provide appreciation and support for this grieving process. They can help us live in this limbo state--Bill Bridge's (1980; 2001) neutral zone--while we grow accustom to the new epistemological stance we have taken. It is with the assistance of a professional coach that we are likely to be successful in managing many stressful transitions. (Mura and Bergquist, 2020).

Commitment

One of our 100 Sage leaders sounded quite a bit like Michael Corleone regarding his Italian upbringing and his deep commitment to family. Unlike Michael, however, this man found that some of the traditional values and perspectives with which he grew-up were at odds with the values he was coming to embrace as an adult. The cognitive dissonance caused by this clash in values motivated him to embrace the newer values and set aside the older ones. This is the essence of commitment-in-relativism and sets the stage for generativity:

> As a young leader my style could have been characterized as explicit, external, assertive, confrontational, verbose, and earnest. There was this sense of needing to prove myself, to assure my worth or value, and to seek validation externally. I come from an Italian immigrant family, where many of these characteristics are cultural norms. However, I came to realize that while I was a rather effective young leader in terms of my tangible accomplishments, my leadership style often placed me at cross-purposes with my broader goal of fostering a more peaceful society. Because after all, I thought, if one cannot resolve conflicts and nurture peace in his or her own personal and professional interactions, how could one possibly believe in the attainment of global peace? That reflection helped me to evaluate and understand the role that I had played in creating or intensifying conflict, and it led me to a more self-disciplined approach to leadership—one that is still assertive but inclusive in reflecting more humility and compassion, and that allows more space for a diversity of opinions and perspectives. Sometimes, I find my old leadership qualities creeping into emotionally charged situations, but I now have the maturity to hold myself accountable for those transgressions without it affecting my overall sense of self-worth and effectiveness.

A second Sage leader whom we interviewed similarly had to confront his dualistic beliefs and alter them:

> When I was younger, certainty was the source of my passion. That is, I believed that something was right or wrong. Today, when the feeling of certainty arises, I let it go because it creates a barrier to creativity and collaboration. Instead of certainty, I've cultivated a stronger attitude about curiosity, which is a much more expansive state of consciousness.

A third person interviewed for the Sage project expressed similar sentiments:

As a young leader I thought it was my job to always have an answer. I felt I needed to have the proper response to every question. While I think there is value to a leader who can provide sage advice and input, experience has taught me that it is more important to ask the right question than have the right answer. The value in posing the question is it gives me an opportunity to gather responses, hear different points of view, build consensus, and come to the best decision. That being said, I've also learned that respect is often gained when the leader is willing to make those tough decisions that may not be popular with others but are the right ones to make.

The movement from certainty to compassion that is exemplified in the following Sage interview suggests that there are indeed decision points about the stance one must take as a precondition to active generativity:

I think the heart of my leadership is compassion. I've seen so much in my family, things happening to the people I loved. I am fascinated by the failings and possibilities of human beings, and I have an underlying strong belief in the goodness of humanity. I always try to look at something with a multi-faceted view, to understand the alternative perspectives in any situation. When I was younger, I was more strident, with strong political views. Now I'm more accepting of others. Everyone has a story, and I try to keep that in mind. I respect where people are coming from and try to learn something from every situation I encounter.

Could these sage leaders have benefited from working with a coach? Many acknowledged that just talking about their challenges and transitions during their interview was quite helpful. Might reflection with a coach have aided their movement to a stance of commitment-in-relativism? Can a shift in leadership perspectives and practices be aided by the questions asked and insights offered by a skillful coach?

With or without a coach, the actors are all present. A fair amount of competency and commitment is present. The stage is finally set. Members of the audience have taken their seats. The lights have dimmed. The actors step forward . . . We are now ready to explore each of the four deep caring roles and the ways in which generativity plays out in a variety of different, though interrelated ways. The first act concerns generativity as played out in the raising of children or the initiation of a special project. We will attend primarily to the matter of conducting a project.

Engaging a Project

In his founding conception of generativity, Erik Erikson focused on the opportunities, challenges and gratifications associated with generativity (vs. stagnation) as it takes center stage during the middle years of our lives. Erickson did not focus on project building among young men and women. In some ways, therefore, we are going against Erikson in proposing child raising as the first generativity role that we often engage during our early adult years.

This is an important aspect of generativity because we experience deep caring when we raise our children, and when we initiate projects related to a set of values or goals that are particularly important for us. We also begin our investigation of generativity with project-building (and child raising) because of the lingering impact these early forms of mature caring have on our lives. We propose that the early dynamics of caring in what we are calling Generativity One continue to influence us when we serve as guardians in passing the torch for projects and organizations about which we deeply care.

We also believe it is important to focus on generativity at this early stage because a Generativity One decision may involve setting aside our dream of initiating a project associated with a life vision. Or it might involve operating inside an existing organization rather than starting one's own organization. Such decisions

not to engage actively in Generativity One are just as important as decisions to engage in more typical Generativity One activities like parenting.

Generativity One and Leaving Something that Lingers

In his book on *The Active Life*, Parker Palmer (1999) employs a wonderful and quite poignant metaphor about dropping one pebble in a basin of water. At first the water in the basin is impacted by the dropped pebble. The ripples in the water serve as clear evidence of the pebble's impact. However, the ripples soon die away, and the water no longer has any memory of the pebble's impact.

We similarly often wonder whether our life is having an impact. Does the water (our world) remember anything about our existence and presence? While Palmer has identified a profound existential issue that each of us must often confront, we gently offer a slightly altered metaphor. We chose to replace the basin of water with a lake. The pebble is dropped in the water and the ripples spread out across the lake lapping on the shoreline. While the ripples soon die out, there are usually small indentations on the shoreline. This suggests that our own impact on the world might not be immediately observable, but somewhere on a distant shore the impact can be found. We have made a difference. . .

Frequently, our impact is discovered many years later in the lives of our children, grandchildren, and perhaps even great grandchildren. While the distant shore is not far away in term of space, it is often far away in terms of time. Similarly, the lingering impact of our work in life might be found in a project we have initiated as its influence cascades across many other segments of our society.

Everything changes a little to accommodate the minor intrusion we have made on the fabric of our community, social system, nation or world. We tread on the earth and leave an imprint. We leave a legacy. This is what Generativity One is all about—and where professional coaching can make a difference. The matter of legacy can be effectively addressed by coaches who spend time with their client considering the leadership practices that most effectively make a lasting contribution to an organization and/or community (Sandstrom and Smith, 2017; Bergquist, 2020)

Early on, and certainly by the time we are young adults, we hope that something endures beyond our life. We hope there will be a legacy, a remnant that endures. As Parker Palmer has noted, we don't want to believe that the water has no memory of the pebble. We give birth to children and begin a project during our young adulthood often in hopes of leaving a mark on a distant shoreline. Furthermore, we often need help in leaving this mark, especially if it involved giving birth to one or more child and raising it.

Thus, the first generativity role is often engaged in relationship with another person. There is *collaborative generativity*. While this form of generativity is to be found in Generativity Two, Three, and Four, it is particularly prevalent in Generativity Two. We find in an enduring, intimate relationship the opportunity to bear and raise children. In this essay, we turn to stories of first order generativity told by couples about the challenges and gratifications that come from shared generativity.

Not all adults find generativity in the raising of children. Some find generativity in a special project they initiate while in young adulthood or even later in life (e.g., lobbying the state legislature for a special cause, staring a not-for-profit organization, planting an annual community vegetable garden). In many instances, we have found that these projects are also shared with a life partner.

In this essay we focus on stories about conducting a mutual project but also touch on the matter of child-raising. For many of the people we interviewed, a shared project is their "baby" and should in no way be diminished by being relegated to some secondary role or defined as a "surrogate" for the child-rearing

process. We will be focusing in particular on the role played by Generativity One in the promotion of projects since we are focused in this set of essays on the role played by coaches in guiding clients through their life of work.

We turn first to the central question in the engagement of first order generativity: should I (or we) initiate a project (or should I/we raise a child)?

Should I/We Start a Major Project?

Many of the people we interviewed for the enduring, intimate relationship project faced the issue of whether to have children, as well as beginning a project that represented something of great value to one or both of them. Such projects can take many forms, ranging from raising animals to mounting a major corporate venture. Regardless of the breadth or depth of the commitment, a project becomes an important source of generativity for people and often helps to define the distinctive character of the individual. In addition. it provides the individual with something to hold on to when the going gets tough.

Collaborative Generativity: Take Larry and Harold, who exemplify a heightened commitment to a specific project: building a home. A couple for six and one-half years, Larry and Harold had similar careers that led directly to their mutual project. Larry was a thirty-four-year-old architect, while Harold was thirty-one and was a successful retail designer/architect. Their commitment to building a beautiful home was widely known and admired in their local community. It was a spectacular home in terms of both design and detail, and it contained the backbone of the rich story of Larry and Harold's relationship from its earliest development.

In arriving at their home, the interviewer walked through the corridor of a large apartment building and into a garden. Tucked away behind a cluster of tall apartment houses, Larry and Harold's cottage stood out in stark contrast against its urban environment. As their story unfolded, it was clear that the detailing was a blend of both their personalities and characters. Harold's diverse artwork, which ranged from oil paintings to ceramic sculptures, was displayed in the living room.

The clean, sharp detail of the structure and the modern leather sofa was a touch of Larry. The old, stuffed chairs sharply contrasted with the newness of the sofa and were indicative of Harold. Downstairs there were two bedrooms with a veranda connecting them. A hot tub was hidden in the corner, overlooking the garden in back. Beyond the garden, the cityscape rose in full view. The second floor consisted of a carefully designed kitchen with a dining area connecting to it. Behind this was a large, yet cozy, living room, with a fireplace and high ceiling. Both Larry and Harold's art were displayed in this room. On the bookshelves were photos and books, representing their separate lives and their life together as a couple.

In this brief vignette, the interviewer insightfully captured the essence of generativity in both members of this couple. They both loved to host other people and demonstrate their shared commitment and expertise in providing a richly sensuous environment in which to live and work. They had created "the good life" by surrounding themselves with their own artwork and architectural design, and by creating an environment that reflected their common tastes as well as the individual tastes.

Heritage-Based Generativity: Much as a shared interest in architecture, design and visual beauty provided the basis for Larry and Harold's mutual project, music and a love of Poland kept Mick fully engaged (and generative) during the past twenty years. As a defector from Poland during the late nineteen seventies, Mick had a deep, abiding interest in the culture and political liberation of Poland. Having been raised by first generation Polish parents, Mick began to played together with his wife at House of Poland events, and they

sang together during evenings in their home where Mick had built a recording studio. Generativity One has merged with Generativity Three.

Mick produced his own recordings and gave or sold them at their performances. Their songs were all written by Mick, while Sheila assisted with vocal arrangements. They loved being able to perform in their own home studio because their home itself had taken on special significance for them. They had bought their home five years ago, and it was in miserable condition. They renovated the house themselves and built their studio into their home. Their interviewer noted that every detail of their home reflected their unique tastes and their love for one another and their music. Mick worries a great deal about future prospects for the performing and recording of Polish music. He hopes someday soon to be able to travel back to his beloved Poland.

It is not unusual for a project to be deeply embedded in one's value system. Many people invest substantial time and money in political campaigns, public causes, or various public service activities. A church or synagogue or other type of religious institution plays a major role in the lives of many individuals. We also found several instances where the establishment of a home went well beyond the normal level of concern and became a special project. A coach can assist in helping their client identify the embedded values that undergird and help to sustain a challenging project. The coach can also help their client identify the ways in which a cherished project fits with (and at times competes with) other life priorities.

In some instances, a project overlaps with one or more of the other roles of generativity we have identified. Many partners mutually invest substantial time and money in political campaigns, public causes, or various public service activities. A church or synagogue or other type of religious institution plays a major role in the lives of many individuals. In some instances, a project overlaps with one or more of the other roles of generativity we have identified. Generativity Four (and Three) are alive and well! A professional coach can provide insights and guidance regarding ways in which several different generative roles can complement one another and even be integrated (such as we find in the generative work done by Mick).

The Challenges of Generativity One

Typically, there are two major questions that face any person when they begin a project. The first of these concerns the amount of time and other resources that they will devote to conducting their project. Chronic stress, due to shortages, rather than acute crises often influence and can even destroy the health of an individual. We must place project management at the top of the list that demand scarce resources. The second question concerns the ways in which a project will be managed. This can be just as stress-ridden and conflict-filled as the problem of scarce resources. We examine both of these stormy issues and rely heavily on observations that participants in our Nevada County, California, Sage Leadership Project have made about Generativity One. We also point to ways in which a coach can help their client successful confront these Generative One challenges.

Time and Money

In the case of projects, the issue of time is often compounded by a concern for the appropriate and feasible allocation of money. How much do I want to invest in this new business? How much can I afford in terms of veterinary and boarding costs for my cherished dog or horse? Where do we find the money to remodel our prized kitchen? In the case of the forementioned Larry and Harold, the remodeling of their home required the entangling of finances for the first time in their relationship. The financing of their home was, according to Harold, "like our marriage." He went on later to point out, "our relationship has evolved into

that of a married couple. We're comfortable . . . much more domesticated. The house is indicative of our lives; it's a blend of both of us. I like garage sales for clothes and furniture. Larry likes nice things."

Larry and Harold had been successful in building their joint project (home and lifestyle) largely because they had honored and made use of their individual differences. Larry is the "financial caretaker," "the designated driver," "the vacation planner." Conversely, Harold is the "navigator, cook, buys groceries, and cleans." Harold is also the "spokesman and the social planner." Larry is more "assertive," whereas Harold is "the more verbal one." They move eloquently together, allowing each other to take the lead at various points in their relationship, particularly with reference to their prized project of having a beautiful home.

Other couples are not quite as emotionally intelligent or appreciative of personal differences and appropriate roles as Larry and Harold. A coach is sometimes needed to help both partners appreciate the contributions being made by their mate, as well as "catch the couple when they are doing it right" (that is focus on moments of successful collaboration).

The Rules Governing Generativity One

What are the rules of the game when it comes to starting a major project? And how do we set priorities and conduct ourselves? Rule-setting is particularly difficult and critical when the decision is jointly made by both members of a couple—as it often is with Generativity One. Many struggles in the lives of the men and women we interviewed concerning their projects centered on Generativity One issues. These issues centered on creating and maintaining a specific business, shared project or production process.

Old Ghosts and Control: These struggles and disagreements often concerned the identification of values and the differentiation between these values and those that were inherited from parents, community, church, or friends. Even after we have come to terms with the separation of our values from those of our parents, something dramatic and often disturbing occurs when we start our project. The voices of our mother or father suddenly come back to haunt us. We find ourselves using the same outmoded assumptions about how to motivate workers or how to sell products as our father or mother used thirty or forty years ago. These assumptions were out-of-date even back then! How might a coach help to exorcise these "ghosts"?

Tally and Kesha struggled individually and collectively with one of the fundamental building blocks of Generativity One: the issue of control in conducting a project. Kesha and Tally both came from a very traditional culture (India) and found that a focal point of their relationship and their shared values was a struggle with old parental and societal values about control. These cultural "ghosts" can be particularly pernicious and a coach will be of value only if they are sensitive to cultural differences (Rosinski, 2003).

Priorities and Responsibilities: Important projects tend to draw in all Eriksonian stages—particularly Generativity One. Primitive concerns about success and control are often the eye of the hurricane during stormy phases in the life of a project. Consequently, project management was often identified as the central problem for a person or couple whom we interviewed. This was certainly the case with Caroline and Sam. They both indicated that their most intensive "serious talks together" had recently centered on priorities and responsibilities. About six weeks prior to the interview, Caroline had become angry about Sam's new job as a church promotional director. It was taking Sam away from their family more than she felt was necessary.

Carolyn confronted him with her frustrations, citing what she termed his "lack of interest" in assuming his share of responsibility around the house and with the kids. She indicated that these problems needed to be fixed immediately or she was considering leaving him. Sam agreed that things had gotten out of hand but

noted that he had recently begun to structure time with Caroline and the kids. He listed the tasks he had recently assumed to demonstrate he had equal responsibilities in their home, but he didn't seem to have a clear picture of what Caroline was left to do. She declined to comment further; they were both uncomfortable at this point. Clearly, they had work to do on this difficult issue.

Sam and Caroline's church played a central role in the continuation and potential solution to their ongoing problems. On the one hand, the church provided them with support, friendships, and a sense of purpose in life. Their children had benefited greatly from the community and the education they received from the congregation. Yet, the sum total of their time outside work and family was consumed in church activities. Sam had his music programs and Caroline taught Sunday school.

However, Caroline was less committed than Sam to volunteering her time to the Church, and she seemed resentful that their social life had never moved beyond the church. Clearly, the church wasn't meeting all of Caroline's needs, while Sam had everything invested in it. If Caroline wanted to remain with Sam, she had to be actively involved in the church. However, this contradiction was not discussable. Thus, a central issue in Caroline and Sam's relationship and child raising was subject to considerable distortion and resentment by both partners. Caroline and Sam were at a crossroad in their relationship, and Caroline threatened to move out. A coach might have been of value here—even if only to recommend that Caroline and Sam see a couples therapist. At the very least, a coach can provide a safe place for the contradiction to be surfaced—especially if the coach is familiar with "church life" and the beliefs held by Sam and Caroline.

Anchoring Life Values: Many people we have interviewed, such as Bessy and Bill, discovered that their life values began to settle securely in place in the early years of building a shared project—in their case starting a flower shop. Generativity One has a way of powerfully anchoring what is truly important in their lives. Typically, responsibilities are firmly and clearly assigned, whereas before the initiation of a shared project these responsibilities were more likely to be loosely framed, readily shifted, or even ignored.

Like many couples, Bill and Bessy made the choice to identify an "equal and logical way" of distributing responsibilities in running the flower ship (including preparing flower displays, ordering flowers, and waiting on customers). Other couples are not so sanguine about the assignment of duties and responsibilities; yet, if a couple is to establish viable norms for project-building, the increased pressures and work demands inside the relationship typically require that they establish firmer boundaries and clearer expectations. When building a project, a couple is clearly in a "business" and must establish business-like rules or they risk destruction of their relationship.

We have often suggested that clients we are coaching establish a "covenant" (Bergquist, 2023). In their covenant, the couple identified ways in which they chose to treat one another in their daily interactions – and particularly in the project they have chosen to initiate together. This covenant can include such matters as patterns of communication, ways of addressing conflict, collaborative problem-solving strategies, and (most importantly) guidelines for making decisions—what we have identified elsewhere as the empowerment pyramid (Bergquist, 2003).

The covenant might also include some "micro-strategies" for sustaining and enriching their relationship. This might mean finding time to get away from the project for a weekend—at least not talk about it at the dinner table. Occasional "bids" might be included in the covenant—these "bids" being moments when one member of the couple goes out of their way to be of assistance to their mate, or takes some action (such as cooking a special meal) that acknowledges the contribution(s) being made by their partner (Bergquist, 2023, pp. 217-219).

Surrogate Parenting: Generativity One Through Impacting the Lives of Children Outside One's Family

Sometimes we try to have it all: children, a paying job, and some valued project on the side. At other times, we try to make our project into a paying job by starting a business, turning a hobby into a business, or making our job more meaningful and enjoyable. In yet other instances, we make the hard decision to forego child-raising and instead invest our time, energy, and generativity in a special project that directly benefits children who are not "our own."

This apparently is the case with Oprah Winfrey, who made the difficult decision not to have children herself. Instead, as she has noted in many interviews, Oprah reframed her Generativity One pursuits by declaring that she would seek to care for all the children in the world rather than devote herself to raising her own biological children. Oprah Winfrey, of course, also has a huge project to run—namely her own massive media enterprise. That is enough to keep anyone fully occupied!

Then there are the less famous leaders in Nevada County, California, who participated in the Sage Leadership Project. They were all devoted to their community and many of them gained great generative satisfaction from working with children who were not their own. One of our Sage leaders offered a touching and poignant observation about the generative impact that resulted from her work with such children.

> Being able to support people and letting them know they're doing a good job are qualities I admire in a leader. And also giving others confidence and making them feel good about themselves and their abilities. When I worked with kids, being with teenagers was always my favorite because I was so into building their self-esteem. And I think doing that has stayed with me, because everyone has to work on their self-esteem. I think I am good at that. I think I boost people's morale.

Another Sage leader offered a more detailed example of how he works with under-served children by offering to volunteer in his local school:

> I do see a different path, mainly due to continuing budget reductions for my organization. The other day was graduation for the preschool in my building, which serves children with severe disabilities. I went in and started playing with the kids. We were playing when a very small guy, who is a fighter, backed-up and put himself in my lap. The teachers said he didn't do that with anyone. We were playing more, and I had to leave for a meeting. The teachers said, "You should come back every day." When I think about my talents, I believe that my ability to connect with kids is my #1 talent, even though it got me to where I am today, and I don't use it in the work I currently do.

A second form of institution-based surrogate parenting is to be found in organizations that serve children who are struggling with the demands placed on them by society. This is the opposite from education. It is the side of isolation and, hopefully, remediation that unfortunately is often given more public attention than the preventive, educational side. One of our Sage leaders found Generative One gratification through his work as the leader of an organization focusing on troubled youth:

> I'm in charge of the entire department that services children in our community who are on probation or are potentially headed there. My span of control is six probation officers and one support staff. I also have authority over all probation officers in other departments and the staff at the juvenile hall. And I have other duties, such as training manager. In this capacity, I feel I am in charge of creating the agency's future. I'm really proud of the new programs we've created to fill

needs in the department. In addition to some of the tactical programs, we're currently trying to expand the number of foster placements in the county rather than send kids off to group homes. It's been nice to be part of that success.

One of our Sage leaders works with both the scouting program and The Friendship Club in her community. She sees this type of generative work to be much more satisfying than the more complex and often convoluted work to be done through political activities (which will be more prominent in the third and fourth generativity roles to which we turn in later essays in this series):

> Whatever group I'm involved with, whether the Boy Scouts or The Friendship Club, I try to bring a personal relationship that can strengthen the organization. So, finding common bonds and building relationships is very important to me. I'm not very political because most politicians are boring. They are limited and not funny. If you build relationships based on trust, you are more likely to move things forward. That is, if people really know who I am, they will tend to trust me when I try to implement something. I don't think a person would be very effective in any long-term position unless they are able to develop a high trust level.

Certainly, there are people who decide to engage in a project while also raising a family. These are the men and women who do try to have it all. The Emerging Sage leaders we interviewed often talked about the conflict and tensions inherent in their effort to be civically engaged while also raising children. We turn in this essay to these challenged men and women and identify ways in which a professional coach might be of assistance..

The Balancing Act

The Emerging leaders from our Sage Project (ages 25-55) often found it hard to establish the right balance between love and work in their own demanding mid-life world. One Emerging Sage leader shared the story of being a busy administrator of a community project who was also trying to find time for his family. This sage leader expressed the opinion that his family derived some benefits from his civic work, but the trade-off he described seemed less than convincing:

> Last night I came home pretty worthless and exhausted. My daughter asked if we could go shoot some hoops and I said, "OK, in just a minute." Next thing I know, I've dozed off. That's an example of not having anything left on some days for my family. Also, in a leadership position in the department it's very hard to walk away and have an extended vacation. We take a number of nickel and dime vacations but haven't done a long trip in a while. So, family life suffers a bit. On the flip side, my kids have met a number of people or had experiences they wouldn't otherwise get. For example, they are very comfortable saying hello to the superintendent of schools.

A second Emerging Sage leader told a story that is all too common for men and women who chose to enter the political arena:

> There is some sacrifice at times, if only because of the need to juggle everything and also be a father. Right now, as I'm running a campaign in addition to all of the other things I have going on, so I sometimes I don't always get to see my kids before they go to bed. I tell myself that it is just temporary, but my wife reminds me there will be something next month, so it is never temporary. But if I am able to help grow our community it will make things better for my kids as well. So, it is a win/win situation.

For some of the Emerging Sage leaders there is an option, but it is often painful. We see the struggle about work/life balance playing out in the decision that some sage leaders make to get "out of the rat race" of civic engagement and spend more time with their children and family. For these men and women, there was often no balance to be found between work or civic engagement and love (time with family). They had to choose one over the other.

If a Sage leader decides not to opt out of her civic commitments, and if she is equally committed to quality Generative One time with her family, what can be done to reconcile those sacrifices and trade-offs? A coach might enter at this point and offer some options. We observed that clients usually can do so in one of three ways.

First, they might consider their project work to be a model for their children and hope that the children will be proud of their efforts and will emulate them during their own adult years. Second, some of our Emerging Sage leaders believed that their civic work would ultimately be of benefit to their children, thus making their outside caregiving simply an extension of their caregiving inside the family. Third, some of these leaders took a more tangible step; they immediately involved their children in their civic projects.

Many years ago, Sigmund Freud offered a simple but profound observation that the two ingredients of a happy and successful life are love and work. But Freud failed to mention that it isn't always easy to balance the demands inherent in both love and work—especially when love has to do with raising children and work has to do with finding time and energy to successfully engage in a project.

We can respectfully ask Sigmund to step aside while we provide some coaching assistance—inviting our client to engage in some polarity management (Johnson, 1996). We encourage our client to spend sufficient time in identifying the benefits of both love and work before turning to the downside of each. Thoughtful consideration of both side of a polarity can lead to a higher level resolution of the polarity or to a novel solution that enables benefits from both sides to be realized.

Generativity One Lingers: Six Options

Up to this point, we borrowed primarily from insights offered by our Sage leaders as we addressed the role of Generativity One in the creation and maintenance of lifelong projects. We also drew from the previous research we conducted with men and women who were involved in long term, intimate relationships Now we draw extensively on our work with coaching and consulting clients---men and women who were often experiencing the challenges of mid-life.

In our Sage Leadership Project, we witness several different ways in which Generativity One continues to be with us—even when we have grown older and moved on to one or more of the other generativity roles. As we will see throughout this set of essays, each of the four generativity roles is always present on the stage even if not in the spotlight. We also find that Generativity One lingers as a dynamic factor with our work in organizations, even if we move during our adult years past the role of Generativity One founder, burden-carrier, problem-solver and strategist. We often continue to lead, despite our best intentions.

There are essentially six ways in which senior men and women address the issue of "retirement"; in our framework this involves finding how to engage or disengage from the major projects in our lives. Several books and articles have been written on this topic. Zalman Schachter-Shalomi and Ronald Miller make profound observations about the process of moving from "age-ing" to "sage-ing" (Schachter-Shalomi and Miller, 1997), while Marc Freedman describes the "encore" careers in which mature men and women engage (Freedman, 2008).

We commend the inspiration and insights offered by these authors, but we propose there are more options than they identify—and that the decisions being made by mature adults are often much more complex and challenging than the processes they describe. As a coach I often am offering six options to my mature client. I briefly identify and analyze each of the six options and connect each to the challenges of shifting Generativity One roles.

Option One—Shifting Careers

This is the option being described by Schachter-Shalomi, Ronald Miller, and Marc Freedman. It involves shifting the skills and knowledge that one has acquired during their "working years" to a second career (often moving from a for-profit organization to a not-for-profit organization). This often involves a transition from Generativity One to Generativity Two, Three or Four.

Option Two—Remaining in Same Professional Career

This is the option chosen by many mature adults who operate within a specific profession. They continue to work as physicians, architects, psychologists, accountants, veterinarians, etc. It is in the professions that seniority is often viewed as an asset rather than a liability. The 60-year-old physician is seen by his patients as being "wiser" than the young doc straight out of medical school (think Dr. Welby), just as the 45-year-old man seeking a psychotherapist is much more likely to choose the 55 year old shrink than her 32 year old associate.

In a few professions in which technology plays a major role (engineering, architecture, geology), there may be a preference from the younger person; but even in these instances those who are new to the profession will seek out a mentor or, at the very least, want to associate with an older person who has gained a strong reputation and knows the professional landscape.

The key to being successful and satisfied with this career option is the challenge of finding a way to remain professionally vital, despite often doing the same kind of work and facing the same kind of problems each day. How does one avoid burnout as a college professor who has taught history for forty years and sat on every major university committee at least once or twice?

Option Three—Retiring from a Position of Formal Accountability

This is one of the two traditional options. The woman who has spent all of her life in a large corporate setting finally gets a chance to breathe fresh air. She does not want to spend any more time in a stress-filled environment. While she might want to do some volunteer work, she avoids taking on administrative responsibilities and sitting on interminable committees. Instead, she seeks active work with children or helps to build a home through Habitat for Humanity or sings in the local community chorus.

This career path is often associated with the experience of women hitting the "glass ceiling." They move up through an organization, being given career advancements because of their knowledge, skills and hard work. Then they hit the organization's ceiling with regard to the highest position that a woman is "allowed" to hold. This is an invisible ("glass") ceiling that can never be formally acknowledged, but the ambitious woman knows the ceiling when she hits it. It is not unusual at that point for the woman to leave her organization and formally retire (or start her own business -- Option One).

It is even more likely that the male retiree seeks something that requires no formal accountability. This is especially the case when a man has lived out a life fulfilling traditional societal expectations about the male as bread winner and "leader of the band." While there may not have been a glass ceiling awaiting this man

as he moved up through the organization, there were often long days and nights of work, stressful meetings, and insensitive and often "stupid" bosses with whom he had to contend. Thank goodness for retirement!

Career Option Four—Avocational Dabbling

The ultimate escape from accountability is to become an avocational junky, doing a bit of everything "just for the hell of it!" We take up photography or act in a community play, not because we ever expect to be any good at this work, but because it is a challenge and a joy. In official psychologize this is called "autotelic" (self-gratifying) behavior. Csikszentmihalyi (1990) describes this as the search for "flow" (the experience of being completely present in a moment that provides both challenge and support).

The original meaning of the word "amateur" was not about someone who is bad at performing some skilled task—instead, it was about deciding to engage in a particular activity as a pastime—just for the love of doing it (the word "amateur" being derived from the Latin word *amator* or "lover").

Career Option Five—Remaining as Leader

As in the case of career Option Two, the mature adult remains active in the role of Generativity Two. He continues to be an active leader in his organization. This leadership can take on many forms and may require a shift in the leader's functions. The leader might remain in an active management role, showing up to work each day and continuing to provide direct supervision and keeping "his hands in the business." Alternatively, he can move up to a position of "chair of the board" or an emeritus position that still allows the leader to influence policy and strategy without having to "roll up his sleeves" every day.

This second variation on career Option Five is strongly reinforced in many traditional Asian cultures. The mature male leader is expected to move outside the active role of manager when he has reached his fifties or at least his sixties. By that time, he is expected to have either retired (Option Three or Six) or become an advisor or overseer ("chairman of the board" or some comparable position). It is considered a sign of failure for an older male to remain actively involved as a manager in his own organization.

While the active leader may be discounted in some cultures, he is also the protagonists in some wonderfully touching novels and movies about the senior citizen who conducts his one last battle. Think of the final scene in Lerner and Lowe's *Camelot* or the near final scene in *Robin and Marion* when Sean Connery, as Robin Hood, and Robert Shaw, as the Sheriff of Nottingham, engage in their final battle. Or, for that matter, think of Sean Connery playing the aging Indiana Jones.

Career Option Six—Escaping from It All

Not all the men and women have chosen to remain active during their senior years. They have moved past the role of Generativity Two and have in many instances also decided not to engage actively in the roles of either Generativity Three or Four. Instead, they have decided to leave it all behind and to truly "retire." In some cases, Option Six isn't really a choice: there are medical issues to address or a disability that leaves them unable to actively engage the world. In other instances, it is a matter of social-economic class: these men and women simply do not have enough money to think of anything other than surviving from day to day on a meager income.

For those who are comfortably situated in life, it might be a matter of priorities: "I would just like to golf" or "I am delighted to spend my day with friends playing bridge." Or "I spend my time working in the garage on my old Buick", or "I don't know what happens to my day each day; it always seems to fill-up with something

or other." Sadly, in some cases it is a matter of burnout that has resulted from a stressful life and career. The outcome is stagnation rather than generativity of any sort.

It is not uncommon for such mature adults to "hide out" in a retirement community that is "siloed" from any contact with younger people or people who are different from them in terms of race, culture, or socio-economic status. While this should not be taken as a generalized statement about all who live in these communities, it is important to recognize that the isolation which tends to occur can have a profound effect on the openness to various generativity roles. In short, these men and women are now "free" from the responsibilities of job, parenting, and civic responsibility; they have often not taken the next generative step, which has to do with "freedom to do something."

Conclusions

At this point, we are ready to move on to the second act. This act concerns an expanded role of Generativity. We move beyond our own project and our own children to consider the growth and welfare of other people with who we are relating. Yet, in moving on to this second act, it is important to recall and appreciate what deep caring means when it comes to our own important projects as well as our family. We must keep in mind that balance becomes even more challenging as we extend our generativity forward. In the midst of all this deep caring we must remain vigilant about our own self-care. This will be a theme that re-emerges when considering each of the four ways of being generative and when considering, in our final essay, how generativity is best nourished.

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