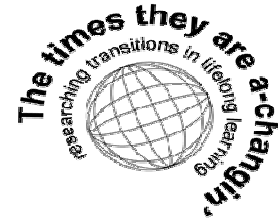


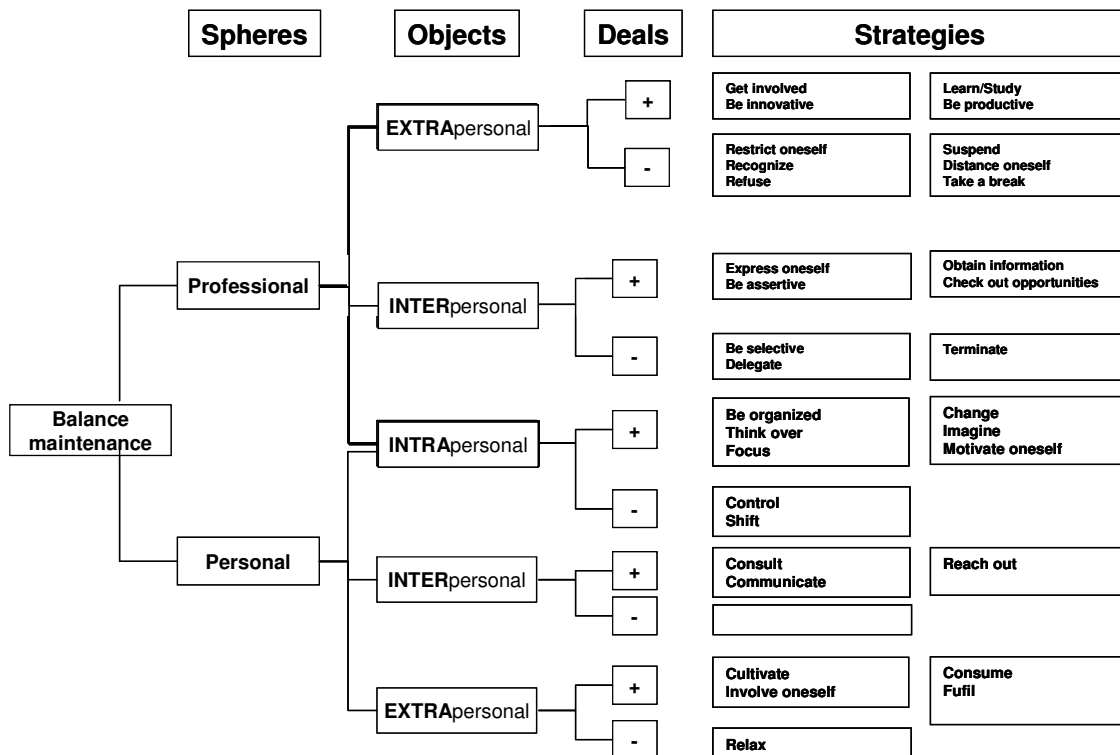
## RELATIONSHIP-BASED CONTINUOUS LEARNING MODEL INCLUDING THE CAREER LEGACY CIRCLE

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### 1. A Continuous Learning Model Integrating Three Components

This paper is about a Continuous Learning Model (Doyon, 2002, 2003) integrating three major components. The first component refers to maintaining a Work-life Balance by means of a set of strategies which avoid both burnout and obsolescence. Presently, several researchers are concerned with work related stress. Among them, Caron (2001), Langouche (2004) and Lamarche (2006) noticed that some work settings simultaneously present both risks of burnout (due to clients' increasing needs) and of obsolescence (due to the technological aspects of their work). Health and security services and vocational training are good examples of such high-risk settings. Simply put, it appears that 5 out of 25 workers exhibit signs of burnout, 4 out of 25 show signs of obsolescence, 3 out of 25 indicate an urgent need for a career shift. The other 15 out of 25 - that is more than 50% - for the most part, without any support from their work environment, maintain a Work-life Balance and are able to avoid both burnout and obsolescence. Based on the scientific literature, Caron (2001) came up with a taxonomy for Career Management Strategies used by subjects, as shown in the figure below.



When employees said to have 'well-maintained' a good Work-life Balance are compared to burned-out or obsolete colleagues, it appears that the well-maintained group managed their careers quite differently. For instance, according to the same author, they used on the average 15 career management strategies compared with 5 and 3 respectively for the burned-out and obsolete groups. Furthermore, the strategies for the well-maintained group invest almost equally to their Work Sphere as to their Personal Sphere, whereas the burned-out group has no real Personal Sphere and the obsolete group presents an atrophied Professional Sphere. Indeed, strategies for the well-maintained

include a variety of extra, inter and intrapersonal interactions, whereas the burned-out group shows no intrapersonal concern in their professional sphere and the obsolete group shows no extra-personal concern in the same interactions. Finally, it appears that the well-maintained group used a bit more adding than subtracting strategies whereas the burned-out use only adding strategies while the obsolete are keen on subtracting. Surprisingly enough, at a time where there is much concern for work-family conciliation or balance, recent research reveal that those whose career is well maintained are already systematically balancing out their work and their lives!

Helping adults more effectively manage their work lives also involves respect and support for each worker's cyclical and ongoing needs for mobility. Consequently, there is a need to make career mobility more efficient and to introduce the second component of the model that is Career Mobility. Mobility in this context refers to a change of function or workplace requested either by the adult or by the organization. The latter may, for instance, need to accelerate the next generations' competency development through work experiences. Borrowing from Clavier's work (2004), the Continuous Learning Model provides assistance for workers facing the imperatives of career mobility. It should be explained here that helping workers develop competencies to make them more mobile is based on a broader concept of career mobility that goes beyond the traditional perspectives of vertical career advancement or geographic mobility. According to the Continuous Learning Model, workers in transition — i.e., workers who must relocate in order to maintain a Work-life Balance—should be given assistance to facilitate their mobility. Career mobility will also be the method used by workers who decide to participate in an accelerated competency development program for their firm's renewal within the next generation of workers. Because this development focuses mainly on the fulfilment of various mandates within a firm, there is increased mobility.

Doyon D. (2003) demonstrated that a Work-life Balance and employee mobility were successfully achieved 85% of the time through supportive relationships, the third component of the Continuous Learning Model. Relationships promote the transmission and joint creation of knowledge and become the cornerstones of an organization's project to become a learning organization. There are organizational tools, such as mentoring, tutoring and Legacy Circles, to facilitate knowledge transmission. Mentoring is based on helping and learning relationships between an experienced person (mentor<sup>1</sup>) and another less experienced interested in profiting from the exchange for his/her personal and professional development. Mentoring is therefore more focussed on the employee's ability to develop. Tutoring is based on relationships between helping experts and trainees that target the transfer of specific competencies in order to provide new employees with some degree of autonomy more quickly. Legacy circles involve a group approach that essentially consists of providing support for people at the end of their careers so that they can compile their legacies and thereby safeguard the organization's corporate memory. For the joint creation of knowledge, there are mechanisms to support the development of coaching relationships, co-development group relationships and action learning relationships. Coaching is understood to be a helping and learning relationship between a coach and a trainee in order to develop the trainee's generic competencies in the here and now. This type of relationship is usually based on performance results. Co-development groups promote professional development through discussions of participants' practices or strategies for maintaining a balance that are specific to their career phases. All participants in these groups take turns being clients or consultants. Action learning groups promote multiple learning experiences through activities and putting learning into practice. Participants work with a facilitator and co-operate with one another to carry out each participant's project.

To promote organizational lifelong learning, it is necessary to build on relationships. Mechanisms must be put in place to make these relationships more relevant and nourishing for all participants according to their needs (specific issues of maintaining a balance and career mobility), type of relationship (dyad or group) and career phase (early, mid or late career). It is understood that each type of relationship has a special character depending on whether it involves knowledge transmission and joint knowledge building, whether the helper's assistance is directional or non-directional, or whether the committed participants choose to emphasize discussion or action in the relationship.

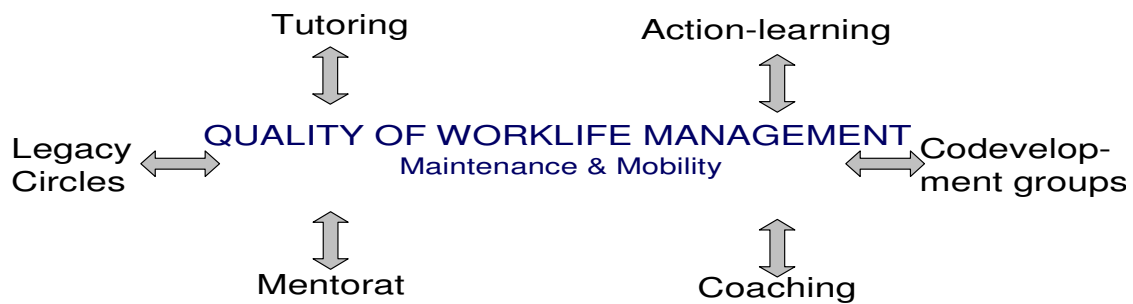
Quality Work-life Balance management is described as *Maintenance* (Ma), *Mobility* (Mo) and *Mentoring* (Me); three words - three Internet-type syllables - beginning with the letter M! Hence, this model, sometimes called the Three "M" Model, develops a context conducive to innovation in the

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<sup>1</sup> Mentor, a friend of Ulysses was asked by the departing voyageur to take care of his son in his absence.

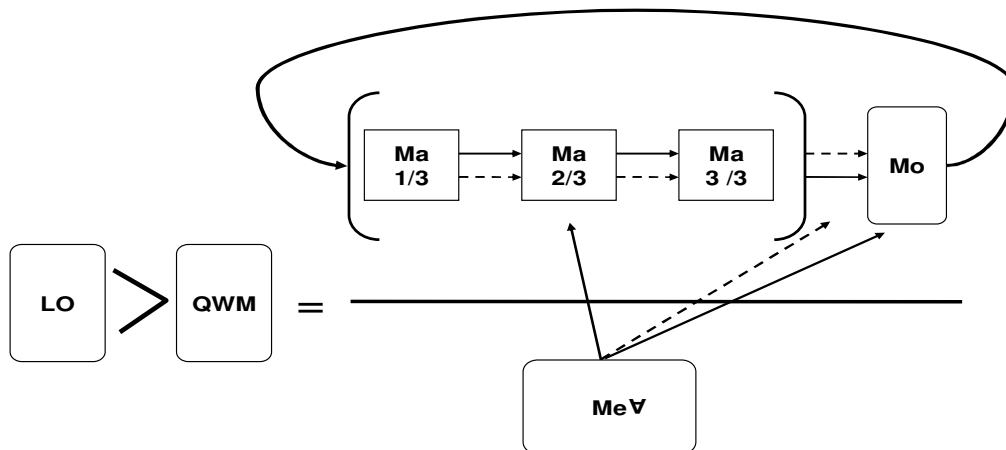
workplace (Nonaka, 2002), a context similar to care providing. Accompaniment methods such as mentoring, coaching and legacy circles are significant learning forums for developing major reflexes, such as the reflex to dare if we do not take an interest in what is essential and fail to recognize that human beings are basically project people with an ability to develop and that their satisfaction with work includes the spin-offs to be obtained from working. Education in using the Work-life Balance paradigm and assistance in developing competencies to give employees mobility are innovative components that enable all workers to take charge of managing their work lives and inevitably lead them to establish significant relationships for the transmission and joint creation of knowledge. The two figures below give an overall view of this model and its components.

### RELATIONSHIP BASED CONTINUOUS LEARNING MODEL



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### Three “M” Organizational Lifelong Learning Model



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## 2. Career Legacy Circles

Most of the expressions used to describe the preceding model are relatively well known to lifelong learning advocates. However, a new expression has crept up: *Career Legacy Circle*. After two years of benchmarking and after eight circles have come to fruition, *Career Legacy Circles* appear to be a perfect application of lifelong learning.

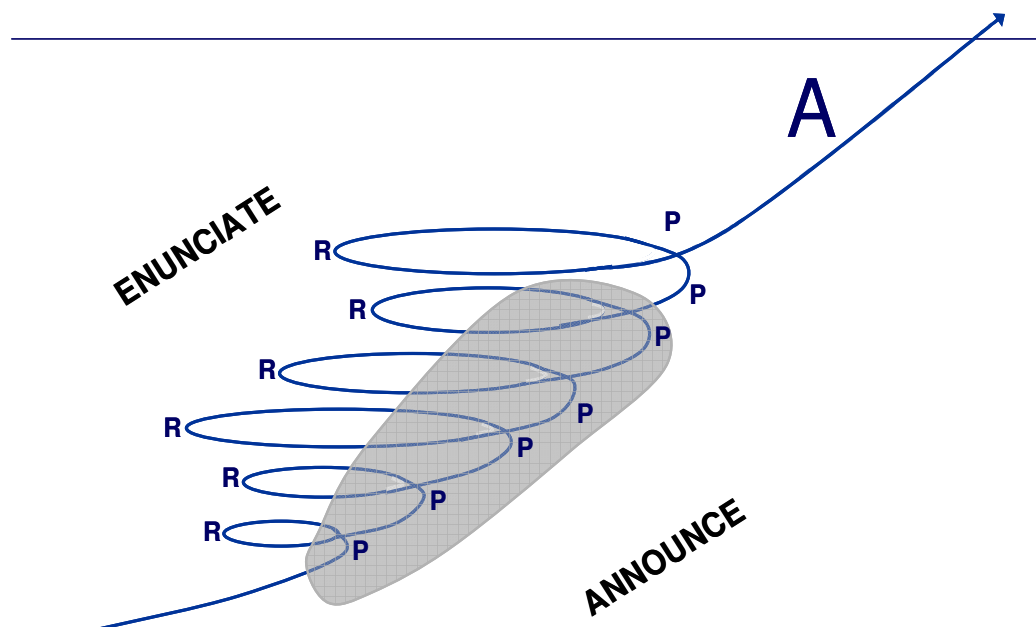
But before describing the process, we would first like to give a profile of the clientele. Circles target workers who are a few years away from retirement; in other words, workers said to be in the last third of their careers (Riverin-Simard, 1984, 2000). As Gaullier (1997) pointed out, this last career third becomes very chaotic, especially since there is no longer a consensus that the 65<sup>th</sup> anniversary is the requisite date for retirement! Indeed, among pre-retirement workers, 66% would like to do so before age 60 and 88% before age 65 (Schellenberb, 2004). In reality referring to Schetagne (2001), from 1992 and 2002, 60% of retirees would have preferred to remain employed and 25% were, in some way or another, forced to retire. Of those who had retired, 33% did however return to work, though this figure does not take into account black market workers working either by choice or through necessity. Moreover, Nininger (2003) indicates that 40% of retired top management in Canada, private and public sectors combined, had difficulty adjusting to their new life. It would be simplistic to conclude that the upper echelon lacks imagination or over attached to a strong work ethic. In fact, 51% of them responded that they wish to remain busy, 56 % wish to remain physically active, 60% wish to make more money, 63% wish to maintain good human contacts and 75% wish to remain mentally active. Now that many countries are facing worker shortages and that many retirees are facing financial shortcomings, both employers and workers have no other choice but to favour work retention.

In the last third of their careers, workers need to keep work and life well balanced in order to finish what they have set out to accomplish and to fulfill their commitments, so as not to leave unfinished what they set out to achieve professionally, interpersonally and emotionally. Hopefully, they may reach their goals without slipping into burnout or obsolescence. To do this, they must be able to reframe their experience and come to terms with successes and failures alike. This means “vocalizing” their “generativity” drive, a drive which springs from a strong and unconscious desire to outlive themselves (Erikson, 1968). They must be able to ‘wrap up’ their vocational legacy with a deep sense of awareness and with noble intentions, however scant or symbolic this legacy may be. Finally, they must look for an heir, a person or an organization that will receive the legacy: this search may prove difficult and produce unexpected results. The last career third is the time for two new *Know hows*: to stay and to go (Limoges, 2004). As a counterpart to one’s personal need for vocational legacy, we find an organizational and social need for knowledge transfer and collective memory conservation. In the end, psychological needs and social needs merge. To align the two, one’s own needs and the needs of others, openness and respect from both parties are required.

To “wrap up their vocational legacy”, Limoges (2004) has written a *Vade Mecum* entitled *Pour un troisième tiers de carrière porteur de vie (For a life bearing last career third)*. This self-help exercise book covers the 7 important questions when working on one’s career legacy. Each question examines a particular aspect to be considered when taking stock. Surprisingly, to be aware of one’s legacy also helps to attain Work-life Balance during the last third of one’s career. For this reason, we include “M 3” in the figure below.

As previously stated that a Work-life Balance and employee mobility were successfully achieved 85% of the time through supportive relationships, a Circle therefore meets 6 or 7 times for three hour sessions in a group setting and participants are required to do “homework” between sessions, using the Limoges’s *Vade Mecum*. Each person works individually looking back or retrospectively (R) and looking forward or prospectively (P) and is then put to the test by sharing with the circle of peers. The object of the exercise is to generate the right and most noble action (A). Having received feed-back from the group, each person then retreats to take stock once more and returns to get feedback from the circle put to the test by the circle yet another time and so on and so forth until the task is completed. This is what is described in the ascending spiral where each step is a building block for the next step. As with the *Vade mecum*, a full Circle approach is used and we metaphorically describe the process as the “Champagne” method twisting the bottle, cork down, a quarter turn each day/time! Using successive “enunciations” and “annunciations”, the purpose is to achieve a “sparkling” career legacy which mirrors the highest values of the subject’s Work Investment. In some form or fashion, the legacies talked about in our Circles are about relationships which are either intra-generational (peers’ confrontations and validations through mirror and echo techniques) or intergenerational (heir, dauphin, protégée, etc). Legacies take on various forms: a written work, a testimony, coaching, and so on. The

heir may be known or unknown, a person or an organization, an association, a country, etc. When one's career legacy becomes clear and when one has come to terms with that legacy, however scant or symbolic it may seem, that person can move forward and determine what is relevant and significant to him or her, thus reducing the risk of burnout through dispersion and of obsolescence through lack of motivation or of meaning. In some cases, this "wrapping up of one's career legacy", may lead to some form of mobility such as taking on a new term or mandate, starting up a business, acquiring new skills, and so on.



So far, research<sup>2</sup> by Doyon, Limoges and Martiny shows that the reflexive process progresses as the group moves forward, moving from a desire --almost an obsession for some-- to « find » and « date » the legacy and make it « materialize », to a more global attitude where the legacy becomes more fluid, as a state of mind, even if some legacies materialize in very concrete forms such as written memoirs, DVDs or testimonies. As one participant put it, she came to realize that her legacy was not so much the fruit but the seed. In essence, she recognized that her heir would nurture this seed in his or her own way and bear new fruit. Others still may become quite upset having not found an heir. They are afraid to leave with a debt!

Thanks to the Champagne method, we have witnessed several about turns. For instance, a participant spent three sessions desperately looking for his legacy only to realise that his legacy was not behind him but was still to come. His legacy was still to be built. A few sessions later, it became evident to him that, in order to leave his legacy, he needed to postpone his retirement. Another participant began the program quite clear about who was the heir to whom she was to bequeath her legacy. Mid-way through the sessions, it was drummed into her repeatedly that her legacy would be of great value to an institution.

In essence, accompanying people during the 3rd part of their career is a real privilege and gives us a special perspective and an opportunity to witness the richness of the human journey. People are pondering about who they are and what they have become, about how they have themselves been heirs during the course of their lives, including their professional lives. They are examining how they have learned and what they have gained, and what legacies have made them what they are today. In the end, the experience has brought us closer to that something that is larger than us! That something that is expressed in these words from participants: « My outlook at work has changed, but the biggest change is my attitude. The destination is no longer as important as the journey...Everyday I am made aware of what I am leaving as my legacy..... »; « I have made my professional path my own. I have given myself as a legacy to me. » « I feel like leaving but this exercise on legacies helps me stay»; « I am retiring with clarity of mind...I know that the next time around it will be the final departure. »

<sup>2</sup> *Les relations au cœur de la gestion de vie au travail*, communication sur les Cercles de legs professionnel, Table ronde, Montréal, Mentorat Québec, [http://www.mentoratquebec.org/Actes\\_2005.pdf](http://www.mentoratquebec.org/Actes_2005.pdf)

This makes us aware that the third part of our career has become exceptional because, whether we know it or not, for better or for worse, it is 'haunted' by the ghost of our legacy and its rituals. In Quebec, the expression « Freedom 55 »<sup>3</sup> was, for decades, synonymous with golden retirement and a leisurely life: financial security, good health, consumerism, rich social life, etc. The time has come for an abrupt social about-turn, as described above, and the first Circles have casted some light on this phase of our lives and prompted some to drastically redefine retirement to include the option of undertaking a new professional activity or at least of prospecting other ways of pursuing the same path. Another outcome for participants is that they may now approach with serenity their retirement from their worklife which has provided a sense of belonging to which they have responded with a sense of loyalty. Freedom 55 now means that fewer and fewer of us are breaking loose from work but that we are nonetheless freeing ourselves from the need to pay for our sins and to live our karma. For one participant, his circle of legacy has become his circle of choice. One out of two participants in our circles have decided to postpone their retirement and a majority question the relevance of an abrupt departure from any type of professional activity.

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<sup>3</sup> 55 years of age for allowance of retirement without penalty.

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