



# The Integral Aging Process (IAP): A Holistic, Sustainable Approach to Personal Development for Boomers and Beyond

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## ABSTRACT

Integral Aging is a holistic and synergistic approach to life and work for individuals in their third quarter of life. This stage of life is generally attributed to individuals in their 50s, 60s, and 70s, an age group that will be filled by baby boomers for the next thirty years. Practitioners have much to offer baby boomers facing transitions and challenges in this stage of life. Through a unique Integral Aging Model and Process, we explore ways for individuals in this stage of life to sustain themselves and to empower others.

### Characteristics of the Boomer Generation

According to labor statistics, nearly 80 million Baby Boomers will leave the workplace in the next decade. Below are several common characteristics of the Baby Boomer generation:

- **Work-Centric:** Baby Boomers are extremely hardworking and motivated by position, perks and prestige. Baby Boomers relish long workweeks and define themselves by their professional accomplishments.
- **Independent:** Baby Boomers are confident, independent and self-reliant. This generation grew up in an era of reform and believes it can change the world. They questioned established authority systems and challenged the status quo. Baby Boomers are not afraid of confrontation and will not hesitate to challenge established practices.
- **Goal-Oriented:** With increased educational and financial opportunities than previous generations, Baby Boomers are achievement-oriented, dedicated and career-focused. They welcome exciting, challenging projects and strive to make a difference.
- **Competitive:** Since Baby Boomers equate work and position with self-worth, they are quite competitive in the workplace. They are clever, resourceful and strive to win. Boomers believe in hierarchal structure and rankism and may have a hard time adjusting to workplace flexibility trends. They believe in "face time" at the office and may fault younger generations for working remotely<sup>1</sup>.

The baby boomers are known as the egocentric (selfish) generation. Subsequent generations are more aware of the necessity to be ethnocentric (caring), worldcentric (universal caring), and being-centric (integrated). These four developmental stages

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<sup>1</sup> <http://legalcareers.about.com/od/practicetips/a/Babyboomers.htm>.



are based on Gilligan's ethical developmental stages<sup>2</sup>. In the Integral Aging Process (Gelardin, 2010, <http://integralaging.org>), mid-life and older individuals embark on a journey from egocentric to ethnocentric to worldcentric to being-centric<sup>3</sup>. They become aware of their subconscious motivations (English, 1998). After they have consciously identified their subconscious motivations, they integrate their values, skills, passions and other attributes. They then apply their strengths and experience to do work (paid and unpaid) that meets the world's needs.

The forces affecting the boomers are many and powerful. Longer life expectancy is a major factor causing people in the "third age" to see their later years as very different from their parents. Higher levels of education give rise to greater job mobility and greater reflection on career and lifestyle choices. Add to this what may be a temporary or permanent economic downturn, and the result is an environment that is causing great stress on boomers throughout the U.S., particularly in our high-density (and high cost) urban centers.

### **Challenges**

The aging field is expanding as the baby boomers move into their 60s. Aging workers (both paid and unpaid, i.e., family caregivers) face many issues and challenges that can lead to employment opportunities for counselors, business coaches, and service professionals who serve this population. Following are a few of the issues.

More and more older workers are choosing, or forced to become, self-employed entrepreneurs or consultants due to downsizing and still needing to make an income. Many older workers have caregiving responsibilities, requiring schedule flexibility. Caregiving often takes a toll on working caregivers' mental and physical health. Whether aging individuals need to earn an income or not, housing often becomes an

issue. Older workers are exploring new kinds of housing, such as co-housing, downsizing, bringing in roomers, small group housing, work/live and live/work housing, aging-in-place, and many other kinds of living situations. A mantra is growing among many displaced workers, "thank G\_d for my second job." Adult schools and colleges provide a growing number of courses in entrepreneurship that help seasoned citizens turn their hobbies into income (Gelardin & Muscat, 2009; Muscat, 2008, 2009).

As we face later-life issues, many aging individuals become more interested in living each day well rather than desperately seeking security in an unsatisfactory job and life. We are searching for meaning and are interested in leaving a legacy that will benefit our children and future generations. End-of-life issues become important to those who have experienced life-threatening illnesses and deaths of relatives and friends, as well as for those who are facing their own health challenges. Individuals experiencing these challenges are turning to workshops and trainings offered by employee assistance programs, professional associations, alumni associations, community agencies, eldercare facilities, and university emeritus programs, on such topics as grief and bereavement, spirituality at work, leaving a legacy, and balancing career and caregiving.

### **Roots of Integral Aging**

Integral Aging is based on Ken Wilber's Integral Theory (Wilber, 2007). Wilber identifies over two dozen ways of developing one's self. A key component in Wilber's Integral Theory is sustainability – the capacity to endure, to maintain wellbeing over time. Wilber also explores a sense of timelessness, moving into metaphysical and spiritual consciousness, which can be helpful to individuals experiencing life-threatening or later-life and end-of-life issues.

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<sup>2</sup> [http://en.wikipedia.org/wiki/Ken\\_Wilber](http://en.wikipedia.org/wiki/Ken_Wilber)

<sup>3</sup> [en.wikipedia.org...](http://en.wikipedia.org...)



Integral Aging refers to Wilber's theory as a launching point to implement a model and process. Integral Aging examines how to practice a holistic way of living. We find that the wellbeing of humans depends of the wellbeing of the natural world and the responsible use of natural resources over time. Sustainability of individuals is interdependent with economic, social, and environmental sustainability over space and time<sup>4</sup>, which includes taking action to insure the sustainability of future generations. A key component of Integral Aging is assessment of where we are, where we have been, and how we can sustain both future generations and ourselves.

### **The Integral Aging Model and Process**

The Integral Aging Model and Process give individuals an opportunity to explore ways to develop themselves socially, cognitively, economically, aesthetically, kines- thetically, affectively, musically, spatially, ethically, physically, and spiritually. This decision-making model is based on the Tightrope Artist Model<sup>5</sup>. Awareness of the present is essential to move through past regrets and future fears. The Active Living Model (Avis & Connelly, 2001) asks the questions "Where have you been? Where are you now? Where are you going? In the Tightrope Artist Model, you explore past family influences, examine what's happen- ing in your life right now, and envision how you might conduct your life (personal, as well as work) in the future.

The Tightrope Model was most re- cently implemented in "Slow Career," an ex- tension of the "Slow Movement" (i.e., "slow food"). Individuals in midlife who experi- ence a shift in career (i.e., ready to move on or change direction, being downsized, not

earning a sufficient salary or failing to get a promotion) use this opportunity to develop stronger life/career understanding to meet the demands of the workplace, employment market, and life, in general (Gelardin et al, 2010). The Slow Career concept evolved into the Integral Aging Process, because aging boomers in transition tend to be in- terested in finding meaning in their work and personal life and open to a contempla- tive, life transition exploratory process.

### **Self-Assessment of Strengths**

Career and adult development educators have developed ways individuals can assess how they are leading their lives and how they might want to change their lives to live more holistically.

Keis developed a series of assessment tools to assist individuals, families, teams, and organizations to realize their potential and purpose in the emotional, mental, psy- chological, intellectual, interpersonal, physical, financial, and spiritual areas of life<sup>6</sup>. According to Keis, understanding your personal style can provide increased clarity in self-understanding and improved rela- tionships with others.

In his Career AIM Assessment, Reile in- vites individuals to envision what they would like their lives to be like in each of the following career and lifestyle areas over the next several years: financial, spiritual, occupational, social, community, family, education, personal, emotional, physical<sup>7</sup>

As noted by Hansen<sup>8</sup>, our lifestyle and career development are influenced by our families, our community, and our global community. Hansen invites individuals to examine the dimensions of their personal

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<sup>4</sup> <http://en.wikipedia.org/wiki/Sustainability>

<sup>5</sup> <http://campus.digication.com/decision-making>

<sup>6</sup> <http://campus.digication.com...>

<sup>7</sup> [http://campus.digication.com/careerwell/5\\_13\\_10\\_Sunny\\_Hanson](http://campus.digication.com/careerwell/5_13_10_Sunny_Hanson).

<sup>8</sup> <http://www.sunnyhansenbornfree.com/>



identity by drawing a "Pie of Personal Identity" that includes the following factors: gender, social class, physical ability & disability, sexual orientation, religion/spirituality, socio-political/historical context, age, language, family, ethnicity, race, and culture. Hansen asks the following questions:

- Have the importance of these factors changed over time?
- Are they likely to change in the future?
- What does the total pie say about you?
- How does it affect your actions?

In her Integrative Life Planning Inventory (Hansen, 1998), individuals are asked to rate their responses to 19 statements, using a scale from "definitely disagree" to "definitely agree." Hansen uses a "quilt" metaphor to suggest that our lives are intricately connected with others (i.e., family, co-workers, community, world community).

The Integral Aging Model extends Hansen's metaphor of putting the pieces of one's life together like a quilt, by applying a variety of brain-based activities that individuals can do to assess their strengths. In the Integral Aging Model, individuals do experiential activities to identify their motivated skills, preferred values, and primary interests (card sorts and video commentary); personal and learning style (paper and pencil and multi-sensory cues); family influences (personal narratives, poetry); inner motivations (metaphor); and environmental preferences (guided visualization).

Among the inventory of holistic self-assessments, values clarification stands out. The authors highlight the opportunity (duty, really) to periodically take values clarification assessments, which can be very rewarding to an aging workforce that is experiencing an extended work/life. The authors support this primacy since the most sustainable decisions over time are those that are congruent with an individual's core values.

We believe that assessing your core values on a regular basis is as important as

having regular medical check-ups. For an example of how values clarification can help a family business make important succession planning decisions, visit: <http://www.octagongroup.biz/about/values-clarification-process.asp>. In this vignette, a long-time lawyer of a first-generation family business engages an outside counselor to assist a patriarch in succession planning with his adult son and daughter. The values clarification process is described in detail and shows the potential value of outside intervention at the start of a planning process.

Another category of Integral Aging tools is the wide range of online converging programs. One such product is the Brain Fitness Program, <http://www.positscience.com>. The self-paced set of lessons sharpens the auditory (hearing system of the brain). Through these lessons, aging individuals take in more of what they hear-speech, music and sounds, so they can react to and remember what they hear better. Medical assessments from this vendor indicate that after 30, the brain gradually begins to take in less information from its sensors. The online exercises are intended to reverse this trend, thereby improving the quality and quantity of the information the brain absorbs from the auditory senses. The goals for any older person are to be able to take in, accurately interpret, and remember more of the communication offered to them by colleagues, friends and family.

In addition to using video and other media, Integral Aging explores space and time through physical movement, yogic techniques, and meditation. The Integral Aging multi-sensory identification of strengths is based on activities in Gelardin's Tightrope Model of Decision-Making<sup>9</sup>, mentioned above under "The Integral Aging Model and Process." The Tightrope Artist Model includes the following eight factors that would be helpful to assess to manage career and life decisions:

- Career Values
- Motivated Skills
- Personal Style
- Career Interests

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<sup>9</sup> <http://campus.digication.com/decision-making/Welcome/>



- Family Influences
- Environmental Influences
- Inner Motivations
- Preferred Learning Styles

### **Field Research**

In the Integral Aging Process (IAP), individuals move from self-assessment of strengths to research. Computer research is often where individuals in transition begin researching their next career and life direction move, but it does not end there. More important is field research, in which individuals interact with others and with their environment; i.e., actively speak with those who are doing the kind of work that interests them, volunteering, apprenticing, browsing books, magazines, taking on part-time work (moonlighting), and participating in activities that appeal to them (hobbies).

### **Field Research in Housing**

The need for the IAP is particularly noted in dense urban centers due to the high cost of housing. Like any crisis, such as the current economic crisis in the U.S.), the environment in many urban centers offers a unique opportunity to the aging. Here is the opportunity: sell high equity, high capacity housing and downsize to smaller capacity, lower value housing that is better suited to aging in place (Muscat, 2009a). We have explored in previous articles (Muscat, 2009b) the need to eliminate (or at least mitigate) housing features (stairs, small doors and bathroom spaces) that prevent a person from remaining in their private home for life.

A homeowner's checklist, that includes essential, desirable, and optional factors, can be a useful tool and effective IAP strategy. Ideally this strategy should be established when homeowners are in good health and should be communicated to the next generation of family members. A multigenerational values clarification process is an excellent first step to making a transitional residential decision.

Our research also shows that a "transitional residential decision," based on clearly

identified values, may require special needs to accommodate a home-based business. Since many older persons may choose to remain self-employed into their later years, this has implications for their IAP housing decision. Research indicates that about half of self-employed persons work at home (Fairle 2004). We cannot make this suggestion without the caution that working at home is not for everyone. A summary of the challenges follows:

**Distractions** - High on the list of those who work at home is that lack of respect for the work activity. Family, friends and even neighbors may not respect the time demands or the privacy one requires to work at home. Setting a firm work schedule and communicating the needs of the business activity is key.

**Loneliness** - This is more commonly a problem that professionals face when they previously had a separate office space in a larger organization. Peer feedback is the reward of outside employment. Individuals working from home need to supplement their need for interaction by joining professional groups such as Rotary, Chambers of Commerce or participating in online networks activities.

**Seasonal Fluctuations** - Some at-home businesses disrupt one's quality of life during peak seasons. The accountant may have to take on help during tax season. The photographer may not be able to manage the "June Wedding Boom". Since an increase in business is highly coveted one must plan carefully and may require personal sacrifice during these fluctuations.

**Physical Limitations** - Residences can accommodate many commercial activities but not without compromise. The infrastructure of most residential properties will rarely compare with the space, technology, and accessibility features of a commercial space.

The best rule is to be open and transparent about a home-based business. Let each client know that you work at home and the reasons for your choice.



## Field Research in Mid and Later-Life Careers

Integral Aging Process field research, such as part-time employment and hobbies, has resulted in dramatic improvements in quality of life for seasoned individuals. Most of us have encountered a seasoned “greeter” at one or more Wal-Mart stores. This type of part-time or seasonal employment has proven to be a win-win arrangement for the employer and employee alike. In a similar way, hobbies can be very empowering and even profitable. Many older gardeners have found a ready market for their produce at local restaurants or farmer’s markets. Regardless of weather, the produce is bartered for other food or generates cash. Such activity is often very life affirming. On the rare occasion, a hobby can spawn a sustainable business activity. One of the authors turned a vacation garden into a vineyard that more than paid for the annual property taxes on the summer getaway.

### Action Plan and Intentions

Those who experience the Integral Aging Process pick up information wherever they go and wherever life is taking them. They digest the information that they absorb, which is often overwhelming at first, and then convert what they find valuable by setting goals and creating an action plan (Knowdell) or setting intentions and then letting life unfold (Miller-Tiedeman).

As they prepare to set out to apply for a job, older workers in transition are often concerned about being over-qualified for work that they might not have chosen in the past. For example, older workers who have caregiving responsibilities may not choose long daily commutes to work, and may prefer more convenient, though lower-paying jobs with shorter commutes, or working out of their home. Gaither<sup>10</sup> provides tips for

those who confront over-qualification signals from prospective employers:

1. Let the interviewer know you’ve already given this issue some consideration.
2. Be candid and define 3-5 reasons why you’re interested in this position.
3. Let the interviewer know you’re a better deal for his or her hiring dollar, and define three (3) unique ways you can help the company.
4. Address the interviewer’s concerns.
5. Stress your desire to stay with the company, and make a personal commitment to the interviewer<sup>11</sup>.

### Documenting The Integral Aging Process

Job hunting and later life planning can be overwhelming. It can be helpful to document the Integral Aging Process by, creating a map and portfolio (Gelardin et al, 2010, p. 31-54). The one-page map includes the following steps: (a) identifying personal and transferrable strengths, (b) exploring media and performing field research, (c) setting goals/intentions, (d) creating an action plan with timeline, and (e) identifying internal and external sources or support. The portfolio, an extension of the map, can be in hard copy, in the form of a looseleaf binder with a tabbed divider pager for each of the five sections above. The map and portfolio, not only keep individuals in career transition organized, but also demonstrate accomplishments and thought processes.

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<sup>10</sup> [http://campus.digication.com/careerwell/5\\_20\\_10\\_Dick\\_Gaither/](http://campus.digication.com/careerwell/5_20_10_Dick_Gaither/)

<sup>11</sup> <http://www.wizardofwork.com>



## Opportunities for Professionals

Following are examples of work opportunities related to the needs of aging individuals, such as those mentioned above:

Later-life career and retirement counseling – Many human resource professionals, trained and employed during the highest level of “corporate downsizing,” may find a growing audience here. Referrals could be sought from clergy, community health professionals or financial service professionals.

Family business coaching – Training institutions, such as The Family Firm Institute<sup>12</sup>, offers programs and certification for personal and financial counselors who would like to provide consulting services to this economic sector that is the backbone of the U.S. and global economy. Courses on the topic of Family Business are offered at a growing number of colleges.

Holistic aging advising – Organizations, such as The Integral Aging Institute<sup>13</sup>, offer training and certification for counselors, coaches and other service professionals to become knowledgeable in both the theory and practice of living and working holistically. Learning experiences can be provided through both live group interaction and distance delivered modalities. In the Integral Aging Certificate training, individuals connect with industry experts to expand their knowledge and focus their energies on living and working holistically, developing mind, body, and spirit. Participants learn how to build an economically and environmentally sustainable practice to benefit themselves, their clients, society, and future generations.

Education and training for professionals who work with older individuals with challenges; i.e., family caregivers, individuals experiencing loss, outplaced workers, older ex-offenders, and other under-represented

populations – Distance-delivered and in-class education and training are available to address the needs of challenged populations<sup>14</sup>.

Building working relationships with lawyers, financial planners, move managers, realtors, and other professionals who specialize in elder issues – These clients may appreciate the soft skills of counselors. The Family Firm Institute publishes a directory of professional services providers who specialize in this area. Many opportunities exist for networking these individuals with community-based organizations, such as rotary, chambers of commerce, and university alumni groups.

Identification of strengths and adapting skills, values, and other attributes and experiences, to new roles (i.e., caregiving) – Most college career centers will offer modest cost assessment tools and career advising that can prove very helpful in exploring a new work/life area.

Supporting clients and modeling integration of body/mind/spirit through techniques such as guided visualization, meditation, breathwork, and yoga – An individual skilled in body/mind therapies, such as guided visualization, yoga, and tai chi, may find that many of the traditional business services providers (above) may be open to recommending IAP integration activities to their clients.

Offering workshops on integral aging themes – Free and for fee workshops, through employee assistance programs, workforce development programs, libraries, faith-based organizations, local agencies, health clubs, farmer’s markets, street fairs etc., are ways to network in a community with an aging population. The key is to seek referrals from all the constituent groups mentioned in this section.

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<sup>12</sup> <http://www.ffi.org>

<sup>13</sup> <http://integralaging.org>

<sup>14</sup> <http://integralaging.org>, <http://careerwell.org>



Designing and marketing career-related resources for aging consumers - Distribution of free and low-fee materials, such as such as assessment tools for later-life planning in the form of card sorts (i.e., CPAD NETWORK, which provides interest, skills, values, retirement decks and worksheets) can be helpful for both individual and group use, and enhance presentations and trainings.

There are many opportunities for professionals to support aging boomers. Some opportunities may require continuing education and training. Professionals who are dealing with their own aging process may choose to explore other careers and both paid and volunteer activities that balance what they are currently doing. Others might find that they need to devote more attention to self-care, care for their physical environment or care for their global community.

It is most effect for professionals who are thinking of serving the aging population to begin at their own center of interest. For example, if you like to walk, offer to lead guided walking tours. If food is your interest, lead a cooking class at a local community kitchen or retailer. Your passion and interest has the best chance of attracting an audience for personal or professional development.

### **Where Do We Go From Here?**

Our commitment to moving beyond the classroom is a proposal to launch a multi-year project in Northern California to promote sustainable work-live communities. The project would forge an alliance of academic, civic, business, philanthropic and governmental talents in reshaping our urban landscape. The process would include data collection and assessment focused on meeting the future needs of our aging populations and our outdated housing infrastructure. The project will build on the pioneering Enterprise Housing project in San Francisco and the resulting recommendations (Adams 2007) for public/private residential partnerships. Two major advancements on the San Francisco project will be attention given to the needs of

home-based caregivers and an overall requirement for green design and construction elements. The resulting project will bring civic leaders, architects, developers and urban planners in direct contact with faculty, students, residents and other stakeholders. This diverse work group will participate in a charrette process similar to the San Francisco project. The resulting innovative residential designs are intended to promote affordable housing redevelopment in one or more Northern California urban centers.

### **Conclusion**

The goal of this article has been to advance the study of Integral Aging. The primary audiences for this material are counseling, coaching and training professionals who serve, or who are thinking of serving, the global aging population. We move quickly from the theoretical to the practical by identifying for the reader a number of practical projects from the aging field. Our hope is that this paper will uncover a growing core of "best practices" that will support a holistic and synergistic approach to life and work for individuals as they age. Our goal is to promote a sustainable way of living through the Integral Aging Process.

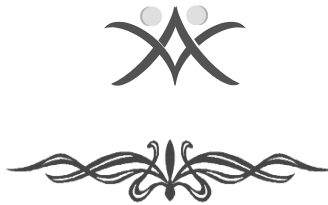
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