Work-role Attachment and Preferences to Extend Career Employment through Phased Retirement

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ABSTRACT

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Using a work-role attachment perspective, this study examined the impact of work attitudes (i.e., job involvement, organizational commitment, and career commitment) on desires to extend career employment through phased retirement. Data were collected via questionnaires that were emailed to non-faculty university employees, and hypotheses were tested with correlational analyses and hierarchical regression analyses. Consistent with predictions, job involvement, organizational commitment, and two dimensions of career commitment (career identity and career resilience) demonstrated significant, positive bivariate relationships with preferences to work beyond the planned retirement age in phased retirement. Further, work attitudes collectively contributed to variation in phased retirement preferences, even after controlling for age, finance, and health. Consistent with previous research, some support was found for the influence of work attitudes on decisions regarding the timing of traditional retirement (as measured by the planned retirement age). Taken together, the results lend some support for the assumption that phased retirement may be used as a retention tool for dedicated workers. Future research is necessary to test whether these preferences are manifested in actual participation in a phased retirement program.

Approved: ____

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INTRODUCTION

Phased retirement is generally defined as a period of reduced work hours (i.e., part-time work) that commences after an employee stops full-time employment and ends with the employee's complete and permanent retirement (Chen & Scott, 2006; Scott & Chen, 2008). Unlike so-called "bridge" jobs, which involve part-time work with a different organization than the long-term employer (Feldman, 1994), in phased retirement part-time work occurs with the same organization that previously employed the worker on a full-time basis.

Many have speculated about the advantages of phased retirement. For example, a recent survey by the American Association of Retired Persons (AARP, 2005) reveals that many employees *prefer* phased retirement to the traditional scenario in which employees abruptly transition from full employment to complete retirement. Phased retirement is advantageous in that it gives employees the opportunity to gradually gain familiarity with the retirement lifestyle while maintaining desirable work contacts, daily structure, and professional status associated with a long-term career job (National Association of State Retirement Administrators [NASRA], 2002; Kaminski-da Roza, 1985). Many employees who have spent years cultivating a professional identity report that an abrupt retirement is "psychologically devastating…painful and unhealthy" (Leslie, 2005). Phased retirement enables employees who are no longer willing or able to continue full-time hours to work part-time to stay mentally and physically active, and to remain productive and useful (AARP, 2005). Employees also have more free time to spend with family, seek desirable leisure pursuits, and engage in other stimulating activities (e.g., starting one's own business) (Kaminski-da Roza, 1985). Moreover, because phased retirement occurs with the same employer, workers do not have to sacrifice professional status, high-paying salaries, desirable social contacts, and other perks, as they would if they chose part-time work with a different employer (bridge employment) (Scott & Chen, 2008; Chen & Scott, 2006).

Others have speculated that phased retirement also has advantages for the employer. For example, it is presumed phased retirement can help firms prevent skill shortages and the loss of institutional knowledge by allowing employees to continue working at a part-time rate when they no longer wish to work full-time hours (Byham, 2007; Noble & Harper, 2009). Phased retirement may be able to save the cost of finding and hiring replacements by encouraging valuable employees to remain on the job (NASRA, 2002). According to the AARP study previously cited (2005), 78% of respondents who expressed an interest in phased retirement reported that the availability of such a plan would encourage them to remain on the job past their expected retirement age. Further, some evidence reveals that the implementation of a phased retirement program may have a positive impact on the overall productivity rate of an organization by accelerating the departure of poor performing employees (Allen, Clark, & Ghent, 2004). Despite the potential importance of phased retirement to organizations and their employees, there has been little theoretical and empirical research on variables that affect the extent and timing of phased retirement preferences. Using a theoretical framework (work-role attachment theory), the present study examined the role of work attitudes on desires and preferences to continue career employment through phased retirement.

Although work attitudes are an important part of prominent models and theories in the retirement literature (Beehr, 1986; Hanisch & Hulin, 1990; Hanisch & Hulin, 1991; Feldman, 1994), few studies have investigated the role of such influences on the extent and timing of phased retirement preferences. Theoretical perspectives found in the retirement literature suggest that employees who identify with and are attached to aspects of the work role may desire to extend career employment through part-time employment when they no longer are willing or able to work full-time (role theory; Ashforth, 2001; continuity theory; Atchley, 1989). The present study is the first to directly examine the influence of work-role attachment on preferences to augment careers through phased retirement. Beyond its theoretical contributions, information gained from this investigation may provide support for the widely held yet under-studied contention that the availability of phased retirement serves as an incentive for highly committed and dedicated employees to remain on the job longer. Thus, the present study seeks to advance both theory and practice on this alternative form of retirement.

Preferences rather than actual participation in phased retirement were the focus of this study. An examination of preferences permits the study of populations of workers that do not typically have phased retirement programs (e.g., blue collar workers). Research on such populations is important because evidence reveals that phased retirement programs may become more widespread (Wyatt, 1999; Hutchens, 2003). Further, an examination of preferences can produce more generalizable results. Unlike actual participation, preferences can be measured and defined independent of characteristics that differ between phased retirement programs. This study defined and developed a generalizable measure of phased retirement preference and examined its relationship with work attitudes for a sample of the workforce that does not typically have phased retirement programs: administrative, clerical, and other service workers.

The sections that follow include a brief overview of work-role attachment theory (Carter & Cook, 1995; Adams, Prescher, Beehr, & Lepisto, 2002) and an explanation of the relevance of work-role attachment variables in predicting traditional forms of retirement (as measured by planned retirement age) as well as preferences to work past the intended date of retirement in phased retirement. Specifically, I developed hypotheses regarding the relationship between work-role attachment and: (a) planned retirement age; (b) desire to further extend employment through phased retirement; (c) total preferred full and part-time work hours, *given* the availability of phased retirement. Further, I hypothesized that work-role attachment variables would collectively contribute to variation in planned retirement age, desire to extend employment through phased retirement, and total preferred work hours, after controlling for chronological age, finance, and health.

Work-role Attachment Theory

Work-role attachment theory is a specific form of a broader perspective referred to as role theory. Roles are defined as “commonly expected and understood designations in a social structure such as an accountant (work organization), mother (family), and church member (religious organization)" (Ashforth, 2001, p. 4). As an individual becomes invested in a particular role it becomes a critical component of her identity and it becomes more difficult for her to leave that role (Latack, Kinicki, & Prussia, 1995;

Carter & Cook, 1995; Ashforth, 2001; Barnes-Farrell, 2003). This notion carries an important implication for the work context: Individuals with greater attachment and involvement in the work-role desire to continue membership in that work role and, therefore, desire to postpone retirement (Feldman, 1994; Carter & Cook, 1995; Barnes-Farrell, 2003).

There are three types of work-role attachment: job involvement, organizational commitment, and career commitment (Adams et al., 2002). Job involvement reflects the extent to which psychological identification occurs with a particular job (Kanungo, 1982). An individual with high job involvement views membership with her position as a central component of identity and feelings of self-worth. It follows that individuals with high job involvement should prefer to continue working longer than individuals with lower job involvement.

The second type, organizational commitment, represents the degree to which an individual places value on his formal membership with a particular place of employment (Allen & Meyer, 1990). According to work-role attachment theory, an employee who is highly committed to the organization desires to continue working longer to experience pleasure from the rewards, social networks, and contributions associated with that particular organization (Adams et al., 2002).

The third type of work-role attachment, career commitment, can be defined as "one's attitude towards one's profession or vocation" (Blau, 1985, p. 278). An individual with a high degree of career commitment strongly identifies with membership of her vocation. Career commitment comprises three sub-dimensions: identity, resilience, and planning (Carson & Bedeian, 1994). Career identity is "the directional component of commitment embodying one's emotions" (Carson & Bedeian, 1994, p. 239); it is defined as the extent to which one's career is central to one's identity (London, 1983). Career resilience is a person's ability to pursue career goals in the face of set-backs (London, 1983), and career planning is the extent to which a person has developed plans to achieve career goals (Carson & Bedeian, 1994). Work-role attachment theory predicts that individuals with greater career commitment (as measured by greater career identification, resilience, and planning) should be more likely to defer retirement.

Empirical research supports the contention that job involvement, organizational commitment, and career commitment represent distinct theoretical constructs. Several studies across a wide range of vocations reveal that measures of job involvement, organizational commitment, and career commitment show good internal consistency, discriminant validity, and construct validity (Blau, 1985; 1988; 1999; Adams et al., 2002). Further, these three dimensions are conceptually and empirically distinct from concepts such as work involvement (Kanungo, 1982), which reflect a more general orientation toward work activities that are irrespective of a particular job, organization, and career.

As mentioned, an individual with greater involvement in and attachment to her job, organization, and career should prefer to postpone retirement to avoid the loss of a valuable set of role activities and an important source of identity. This proposition is also consistent with continuity theory (Atchley, 1989), which asserts that individuals desire to preserve psychological identity and to continue the same set of activities throughout their lifespan. The following section describes empirical evidence that supports the proposition that job involvement, organizational commitment, and career commitment are positively related to planned retirement age.

Work-role Attachment and Planned Retirement Age

Some evidence supports the proposition that individuals with greater job involvement are more likely to plan a later retirement age. Studies by Hanisch and Hulin (1990; 1991) reveal that individuals who are more invested in and assign greater importance to their job report lower feelings of job withdrawal. (Job withdrawal is a theoretical construct which represents turnover intentions, desires to retire, and planned retirement age.) Similarly, studies found that individuals with higher work satisfaction were more likely to continue working into old age (Reitzes, Mutran, & Fernandez, 1998), and a study by Taylor and Shore (1995) revealed a positive relationship between job satisfaction and planned retirement age. Further, several studies found negative relationships between job involvement and turnover intention (Sjoberg & Sverke, 2000), and job involvement and actual turnover (Blau & Boal, 1989; Hom & Griffeth, 1995). To my knowledge, no studies have directly examined the relationship between job involvement and planned retirement age. As an extension of previous research, I made the following hypothesis:

Hypothesis 1: Job involvement is positively related to planned retirement age.

Empirical evidence is consistent with the proposition that organizational commitment is positively related to planned retirement age. Taylor and Shore (1995) found a positive correlation between organizational commitment and planned retirement age, even after controlling for financial, health, and demographic variables. Similarly, a subsequent study found that organizational commitment was negatively related to retirement intention (Adams et al., 2002). As a replication of past research, I made the following hypothesis:

Hypothesis 2: Organizational commitment is positively related to planned retirement age.

Studies have also found that career commitment is positively related to intended or planned retirement age (Erdner & Guy, 1990; Adams, 1999), and negatively related to intention to withdraw from one's career (Aryee, Chay & Chew, 1994; Blau, 1989). Similarly, Meyer and colleagues found that nurses with strong affective occupational commitment were less likely to intend to leave the nursing profession (Meyer, Allen, & Smith, 1993). As a replication of past research, I made the following hypothesis:

Hypothesis 3: Career commitment is positively related to planned retirement age.

The aforementioned studies examined relationships between work-role attachment variables and traditional conceptions of retirement. In the traditional scenario, employees abruptly transition from full employment to complete retirement, virtually overnight. However, evidence suggests that non-traditional types of retirement may further extend the desired retirement age for individuals with strong work-role attachment (see bridge employment and work attitudes; Wang, Zhan, Liu, & Shultz, 2008; Gobeski & Beehr, 2009.) Of relevance to the present study is a non-traditional form of retirement referred to as "phased retirement." Although theory and evidence suggest that work-role attachment variables have relevance in predicting phased retirement preferences and decisions, most research on phased retirement has been limited to investigations of the influence of financial and demographic variables on phased retirement decisions. The present study is the first to extend work-role attachment theory to this alternative form of retirement.

In the following sections, I provide a definition of phased retirement, and hypothesize relationships between work-role attachment variables and desires to work past the planned age of traditional retirement in phased retirement.

Defining Phased Retirement

As noted, phased retirement is a period of reduced work hours with a worker's long-term employer. It commences after the employee stops full-time employment and ends with the employee's total, permanent retirement. According to Scott and Chen (2008), the definition of phased retirement can be subdivided into three parts. The first part, "reduced work hours," implies that individuals who choose phased retirement transition from full-time employment to part-time work hours before complete retirement. This phenomenon is typically measured objectively (as in a reduction in the number of hours worked; Haider & Loughran, 2001) as well as subjectively (self-reported change in status from "full-time" to "part-time;" Gustman & Steinmeier, 2000).

The second part of the definition, "long-term employer," distinguishes phased retirement, which involves reduced work hours for the *same* organization, from partial retirement (Gustman & Steinmeier, 1984) or bridge employment (Feldman, 1994), which involve retirement from the long-term employer to work reduced hours in a *different* organization (Kantarci & Soest, 2008; Chen & Scott, 2006). In some scenarios, phased retirement is offered through formal programs in which an employee signs an agreement to retire from full-time employment to continue working at a reduced capacity for some time period (e.g., 1-5 years; see Chen & Scott, 2006). However, phased retirement is more likely to occur through informal arrangements between employers and employees (Wyatt, 1999; Hutchens, 2003).

The third component of the definition of phased retirement, according to Scott & Chen (2008), is the expectation that the phased employment will lead to the complete and permanent retirement of the worker. This part of the definition precludes employees who desire to work part-time with the hope of resuming their careers in the future (Scott & Chen, 2008).

Work-role Attachment and Phased Retirement

Although strongly committed employees may desire to continue working, factors beyond their control may limit their ability to work full-time hours. As stated by Kim and Feldman (2000):

> As much as older individuals want to continue valued activities in retirement, aging constrains their freedom to do so. A gifted artisan can no longer fully pursue his craft if stricken with Parkinson's disease; a talented executive may no longer be able to pursue her career as fully if she becomes responsible for an ill spouse. *Consequently, although the desire for continuity remains high, the ability to achieve continuity through old routines is not always possible* (p. 1196, italics added).

The desire to maintain continuity is particularly high for those who are heavily invested in the work role: that is, those with strong work-role attachment (Carter & Cook, 1995; Gobeski & Beehr, 2009). Yet, for even the most dedicated workers, achievement of continuity is not always possible because of factors beyond their control, such as declining mental and physical ability. Indeed, studies reveal that health often surfaces as a stronger predictor of retirement age and subsequent well-being than job attitudes (Feldman, 1994; Shultz, Morton, & Weckerle, 1998). Furthermore, desires of employees with strong work-role attachment to continue working are often tempered by desires to spend time with family and engage in leisure activities (Shultz et al., 1998).

With the availability of a part-time work option, family, leisure and health issues may become more manageable. A reduced work load allows strongly committed workers to continue desirable work activities while allowing more time for leisure and family. In stark contrast to the dichotomy associated with traditional retirement (full-time or complete retirement), part-time employment (phased retirement) serves as a satisfactory alternative for highly attached employees who cannot or do not wish to continue working full-time.

Evidence supports the proposition that employees with strong work-role attachment are more likely to continue working in part-time employment after they no longer can or want to work full-time. Studies reveal that employees who exhibit more positive attitudes towards their jobs, organizations, and careers often continue their work after retirement by engaging in part-time bridge jobs that are in the same career field but with other employers (Heindel, Adams, & Lepisto, 1999; Wang, Zhan, Liu, & Shultz, 2008; Gobeski & Beehr, 2009). Using a longitudinal design on a nationally-representative sample of employees, Wang and colleagues revealed that job satisfaction was positively related to participation in bridge employment in the same career field, and this relationship held even after controlling for age, health, education, financial variables, work stress, marital status, marital quality, and retirement planning (2008).

Regarding research on job involvement (as opposed to other work-role attachment variables), Heindel and associates (1999) found a positive relationship between job involvement and intentions to accept bridge jobs in the same career field. However, firm-specific knowledge relevant to a particular job title may not completely generalize from a long-term employer to a bridge job because of differences in firm policies, procedures, and social climate; and thus, it may be preferable to work with the same employer (phased retirement) to avoid the hassle and confusion associated with learning "the ropes" of working with a new employer. Also, by working with the same employer the social contacts, professional status, and other perks associated with the current employer would not be forfeited (Scott & Chen, 2008). In support of this notion, some evidence suggests that employees with positive attitudes towards work are more likely to continue work in phased retirement rather than to completely retire or work in a bridge job (Chen & Scott, 2006).

Hypothesis 4: Job involvement is positively related to the desire to continue working in phased retirement beyond the planned retirement age.

Further, an employee who is committed to her organization may desire to continue working past her planned retirement age if a part-time option is made available.

A previously cited study (Heindel et al., 1999) found that organizational commitment was positively related to the intention to participate in bridge employment in the same career as the long-term employer. The availability of phased retirement should be preferable to bridge employment because workers would not have to sacrifice the social network and rewards associated with a particular organization by accepting phased employment. It follows that employees who are strongly committed to their organizations are more likely to prefer to work in phased retirement after the planned retirement age.

Hypothesis 5: Organizational commitment is positively related to the desire to continue working in phased retirement beyond the planned retirement age.

As mentioned, the status associated with membership of a vocation or profession is an important source of satisfaction and self-esteem for those who assign great importance to and identify with their career role. Individuals who strongly identify with the career role should desire to preserve their career identity by continuing to work part-time when they are no longer willing or able to work full-time. Consistent with this view, Gobeski and Beehr (2009) predicted that employees with stronger career attachment would be more likely to obtain a bridge job in the same career field after retirement from a long-term employer. Results supported their prediction, even after controlling for age and unemployment rates. Gobeski and Beehr (2009) explained their findings using continuity theory (Atchley, 1989). As mentioned, continuity theory states that individuals continue to have the same psychological makeup across the life span and in the face of major life transitions, such as retirement. Further, a previously cited study (Heindel et al., 1999) revealed that career commitment was positively related to the intention to accept a bridge job in the same career field. Similarly, another study found that older workers (specifically, age 53-54) with strong occupational aspirations were more likely to express a preference to continue working part-time or full-time rather than fully retire (Raymo, Warren, Sweeney, Hauser, & Ho, 2009).

Because phased retirement occurs with the long-term employer, it offers more opportunities for advancement, recognition, and money than bridge employment (Scott & Chen, 2008). These opportunities are important for those who identify strongly with the career role (London, 1983). Consistent with continuity theory (Atchley, 1989), as well as work-role attachment theory (Adams et al., 2002), it follows that employees with stronger career commitment should prefer to work past their planned age of retirement in phased employment.

Hypothesis 6: Career commitment is positively related to the desire to continue working in phased retirement beyond the planned retirement age.

Work-role Attachment and Total Preferred Work Hours

As mentioned, multiple theoretical perspectives in the retirement literature predict that individuals with stronger work-role attachment desire to continue working longer, whether in full-time employment or part-time employment. Hypotheses 1, 2, and 3 state that work-role attachments are positively related to the traditional retirement date (as measured by planned retirement age), and Hypotheses 4, 5, and 6 propose that work-role attachments are positively related to the desire to continue working beyond the traditional retirement date in phased retirement. From these hypotheses it follows that a person with stronger work-role attachment should desire to work more total hours prior to complete and permanent retirement.

Hypothesis 7: Job involvement is positively related to total preferred work hours.

Hypothesis 8: Organizational commitment is positively related to total preferred work hours.

Hypothesis 9: Career commitment is positively related to total preferred work hours.

Work-role Attachment and Control Variables

To determine whether work-role attachment variables can contribute to our understanding of retirement decision-making, it is important to ascertain whether work-role attachment accounts for unique variation in planned retirement age and phased retirement preference beyond other factors that have been found to play a critical role. To that end, another goal of the present study was to assess whether work-role attachment variables collectively explained unique variation in planned retirement age and phased retirement preference after controlling for age, finance, and health factors. Control variables are described below and in the methods that follows.

Age. Consistent with common wisdom, it is well-established that older individuals are more likely to retire than younger individuals (Talaga & Beehr, 1989). This relationship occurs in part because of the increased availability of financial resources among older workers (e.g., pension benefits, social security, and Medicaid). Further, age-related declines in health limit the ability of older workers to continue working. However, older employees tend to report higher planned retirement ages than younger respondents (Taylor & Shore, 1995). The positive relationship between age and planned retirement age may occur because younger people are less motivated (or less able) to consider all the relevant information that is necessary in estimating retirement age (Evans, Ekerdt, & Bosse, 1985).

The odds of participating in phased retirement also seem to increase with age (Ghent, Allen, & Clark, 2001; Allen, Clark, & Ghent, 2004; Chen & Scott, 2006). This relationship may occur for two reasons. First, older employees are more likely to be eligible for full pension benefits and therefore do not suffer a financial loss if they choose to reduce work hours (Allen, Clark, & Ghent, 2004). Second, because older employees are more likely to have met their career aspirations, they may view non-work activities (spending time with family and pursuing leisure activities) as more important than continuing to work at full-time hours.

Financial Variables. A vast body of research has established a strong negative relationship between financial variables and retirement age (Taylor & Doverspike, 2003; Feldman, 1994; Talaga & Beehr, 1989). Simply put, those who perceive greater financial comfort are likely to retire earlier. For example, studies reveal that an individual's belief about the adequacy of her postretirement income is inversely related to her planned retirement age (Taylor & Shore, 1995; Beehr, 1986). Financial factors are also associated with the decision to participate in phased retirement. Chen and Scott (2006) found that phased retirees had higher incomes than individuals who fully retired or took bridge jobs.

Health Status. Studies reveal that both actual and perceived health status are important determinants of retirement decisions and retirement adjustment (Taylor &

Doverspike, 2003; Feldman, 1994; Beehr, 1986). Workers who perceive better health and subjective well-being have the physical capability to continue work longer. Consistent with this view, studies reveal that those who are in better health generally plan to retire later (Taylor & Shore, 1995) and are more likely to accept part-time work after retirement from a long-term employer (Wang, Zhan, Liu, & Shultz, 2008). A study by Chen and Scott (2006) did not find a significant relationship in self-reported health among those who participated in phased retirement. However, because of the dearth of research on health status and phased retirement, further investigation is warranted.

Hypothesis 10: Job involvement, organizational commitment, and career commitment will collectively contribute to variation in planned retirement age, after controlling for age, finance, and health.

Hypothesis 11: Job involvement, organizational commitment, and career commitment will collectively contribute to variation in preference to work beyond the planned retirement age in phased retirement, after controlling for age, finance, and health.

Hypothesis 12: Job involvement, organizational commitment, and career commitment will collectively contribute to variation in total preferred work hours, after controlling for age, finance, and health.

METHOD

Participants

Five hundred ninety-five non-faculty employees from a university in Midwestern United States were asked to participate in an online survey, administered through the university's email system. Respondents were informed that participation in the study was completely voluntary, and that there was no penalty for the type of response given to survey questions. They were also informed that they were allowed to complete the survey during work hours. Two hundred sixty-six individuals completed the surveys. Participants were excluded from the study for any of the following reasons: They were younger than 45 years old, did not have at least 5 years of organizational tenure, or provided incomplete surveys. The final sample consisted of 151 employees. Participants held non-faculty positions (e.g., administrative, clerical, and accounting). The average participant age of the final sample was 55. Participants were mostly female (88%), 73% of respondents were married, and nearly all participants were Caucasian (95%) and employed on a full-time basis (99%). Twenty-six percent had a college or graduate degree. On average, participants had 19 years of organizational tenure.

Operationalizing Phased Retirement Preferences

Phased retirement preference was defined and measured based on the three criteria laid out by Scott and Chen (2008). The first criterion was that phased retirement involves a period of part-time work after full-time employment and before complete and permanent retirement. The interpretation of "part-time" is subjective in nature and varies by occupation, industry, and personal preference; therefore, in this study, interpretation of “part-time” was left up to the respondent. The second criterion (established by Scott and Chen) was that phased retirement must occur with the same employer rather than a different one. The third criterion was that employees who plan to work part-time will eventually retire rather than re-initiate full-time employment.

Further, the present investigation did not place a constraint on the desired length of participation in phased retirement, for two reasons. First, although most formal programs limit phased retirement to a specific range of years (e.g., 1 to 5 years; Ghent, Allen, & Clark, 2001), both formal and informal phased retirement may occur indefinitely. Thus, allowing respondents to choose how long they desire to participate is realistic to some degree. Second, allowing respondents to choose the extent of participation is of interest to organizational scientists and practitioners who wish to assess the degree to which phased retirement extends the work life of employees. Conversely, imposing a constraint on the time period of participation could have resulted in range restriction, which may have limited the interpretability of findings from this study.

Criterion Measures

Planned Age of Retirement. Planned retirement age was ascertained with the following question: “At what age do you plan to retire?” Consistent with previous research (e.g., Taylor & Shore, 1995), reported planned retirement ages were grouped into five response categories: 59 and younger = 1, 60-63 = 2, 64-66 = 3, 67-70 = 4, 71 and older = 5.

Preference to Extend Careers through Phased Retirement. After participants stated their planned retirement age, they were asked to rate their preference to extend career employment via phased retirement in two ways. The first way required them to rate their preference with three Likert-type statements (1 = *strongly disagree*; 5 = *strongly agree*): “A part-time work option would encourage me to work past my expected age of retirement;” “I would prefer to extend my career through phased retirement;” and “The availability of phased retirement would offer me the flexibility needed to continue my career.” A composite measure of preference was formed by assigning a single score to each individual based on his or her average rating across the three items. Cronbach’s alpha was .88 for this composite measure. The second manner in which phased retirement preference was assessed was with a single item: “I would prefer to work beyond my expected date of retirement in phased employment.” Responses were *yes*, *no*, or *not sure*. Response categories *yes* and *not sure* were collapsed into a single response category and assigned a value of “one.” *No* was assigned a value of “zero.” Thus, this second measure reflects a dichotomous assessment of phased retirement preference.

Total Preferred Work Hours. Total preferred work hours is a hypothetical construct that was created to capture the totality of an employee’s desired future work commitments in the current organization, *given* the availability of phased retirement. Total preferred work hours is represented by the following formula: $T = F + P$; where T represents total preferred work hours; F represents planned full-time hours in traditional retirement; and P represents preferred part-time hours in phased retirement.

F was calculated by subtracting 62 from the planned retirement age and multiplying the result by 2000 (an approximation of the normal hours worked in a 50-work-week year at the university). Sixty-two is the minimum age of eligibility for social security, and provided an arbitrary reference point to compare those who planned to retire early (as defined as plans to retire before age 62) to those who planned to retire late (as defined as plans to retire after age 62). (Those who planned to retire before age 62 received a negative value for F.) It should be noted that (per the Social Security Administration) most workers elect to receive social security benefits at age 62.

To estimate P (i.e., the total preferred part-time hours in phased retirement), respondents were asked to provide information about the number of years and number of hours per week they would prefer to work in phased retirement after their planned retirement dates. Regarding the number of hours per week, participants were required to choose one of the following: "I do not wish to work for this organization after my planned retirement date (0 hours)," 0-9 hours per week, 10-17 hours per week, 18-25 hours per week, 26-34 hours per week. P was estimated by taking the midpoint of part-time hours per week chosen by a given participant (e.g., participants who selected 26-34 hours per week received a score of 30 for hours per week) and multiplying this value by 50 work-weeks times the number of years selected.

Finally, T (i.e., the total preferred work hours) was computed by taking the sum of P and F. For example, a participant who planned to retire at age 63 would be given an F of 2000 [(63 – 62) times 2000)]. If she chose to then work part-time in phased retirement after her planned retirement date between 26 and 34 hours per week for 3 years she would be given a P of 4500 (30 hours times 50 weeks times 3 years); and thus, a T of 6500 (2000 + 4500).

It is the author's belief that the difference between 18000 (the equivalent of a planned retirement at age 71 with no preferred phased retirement hours) and higher amounts is not meaningful.[1] Therefore, participants who reported total preferred work hours that exceeded or were equal to 18000 were given a score of 18000.

Costs and Benefits of Phased Retirement. Participants were asked to report potential costs and benefits of participating in phased retirement with the following item: "Please state some reasons why you feel that phased retirement may or may not be good for you." Responses were open-ended.

Work-role Attachment Measures

Job Involvement. Job involvement was measured with ten items from Kanungo's (1982) job involvement questionnaire. Responses ranged from 1 (*strongly disagree*) to 6 (*strongly agree*). Sample items included "I live, eat, and breathe my job," and "I am very much personally involved in my job." Cronbach's alpha was .86.

Organizational Commitment. Organizational commitment was measured with eight items from the Affective Commitment Scale (ACS) developed by Allen and Meyer (1990). Sample items included "I would be very happy to spend the rest of my career with this company," and "This company has a great deal of personal meaning to me." Responses ranged from 1 (*strongly disagree*) to 7 (*strongly agree*). Cronbach's alpha was .90.

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[1] This belief is also consistent with the way planned retirement age was measured in this study (as well as previous studies; e.g., Taylor & Shore, 1995): That is, no distinction was made among individuals who reported planned retirement ages that exceeded or were equal to 71 (i.e., they were all assigned a value of 5).

Career Commitment. Career commitment was measured with the twelve-item Career-oriented Commitment Measure (CCM) developed by Carson and Bedeian (1994). Example items are "I strongly identify with my chosen line of work/career field," and "I have created a plan for my development in this line of work/career field." The measure consisted of three scales: Career Identity, Career Planning, and Career Resilience. Cronbach's alphas for the scales were .85, .83, and .84, respectively. All twelve questions were answered on a seven-point rating scale ranging from 1 (*strongly disagree*) to 7 (*strongly agree*).

Control Variables

Age. Chronological age was measured by asking respondents to report their age.

Financial Comfort. Financial comfort was assessed by asking participants to rate their anticipated financial comfort at four different ages: 55, 60, 65 or 70. Responses ranged from 1 (*strongly disagree*) to 7 (*strongly agree*). Cronbach's alpha was .86. A composite score was computed by averaging ratings across the four different ages.

Financial Motive for Phased Retirement. The degree to which a respondent's desire to participate in phased retirement was attributed to financial reasons was ascertained with the following question: "To what extent is your preference to work past your planned age of retirement in phased employment based on financial reasons?" Participants were asked to choose one of the following: (1) not at all; (2) it is a reason, but it is not the primary reason; (3) it is the primary reason, but it is not the only reason; (4) it is the only reason I would prefer to work past my planned retirement age in phased retirement.

Health Satisfaction. Health satisfaction was measured with four items. The first item was: "Overall, I am very satisfied with my health" (Krause, 1991). The second item was: "My health is better than most people my age" (Hatch, 1992). The third item was: "My health limits my work" (Ekerdt & DeViney, 1993). The final item was: "Generally speaking, my health is very good" (Adams, 1999). Responses ranged from 1 (*strongly disagree*) to 7 (*strongly agree*). Cronbach's alpha was .91.

RESULTS

Table 1 displays descriptive statistics consisting of means, standard deviations, correlations, and reliability coefficients for all variables. Item descriptive statistics are found in Appendix A and the survey instrument is found in Appendix B.

As shown in Table 1, the mean total preferred work hours beyond age 62 was about 2700 (*SD* = 9943.01). The total preferred hours is the sum of two components: total planned retirement hours (1520) and total preferred phased retirement hours (1180). Expressed in work years, the total was age 63.35, which was a planned retirement age of 62.76 plus 0.59 years of preferred phased retirement. This result indicates that, with the availability of phased retirement, the average respondent would work about 0.59 years, or 7 months longer.

Correlational Analyses

Hypotheses 1 through 9 were tested with correlational analyses (see Table 1). Support for a hypothesis was found if the bivariate association between a work-role attachment variable and a criterion, as represented by Pearson's *r*, was positive in value and significantly different from zero at the alpha .05 level (as indicated by a two-tailed *t* test). Marginal support for a hypothesis was revealed if a positive bivariate association was significantly different from zero at the alpha .10 level (but not significantly different from zero at the alpha .05 level).

Hypotheses 1 through 3 predicted that work-role attachment variables were positively related to planned retirement age. Specifically, Hypothesis 1 stated that individuals with higher job involvement plan to retire later than those with lower job involvement. Hypothesis 1 did not receive support: Job involvement was not significantly related to planned retirement age. Hypothesis 2 indicated that individuals with higher organizational commitment plan to retire later than those with lower organizational commitment. Hypotheses 2 received marginal support: Organizational commitment demonstrated a marginally significant positive relationship with planned retirement age, $r = .16$, $p = .06$. Hypothesis 3 stated that individuals with higher career commitment plan to retire later than those with lower career commitment. Hypothesis 3 received partial support: Only the career-identity sub-dimension of the career-oriented commitment measure demonstrated a (marginally) significant relationship to planned retirement age, $r = .16$, $p = .07$.

Hypotheses 4 through 6 predicted that work-role attachment variables were positively related to preference to work past the planned retirement age in phased retirement. Specifically, Hypothesis 4 stated that individuals with higher job involvement would have a stronger desire to extend career employment through phased retirement than those with lower job involvement. Hypothesis 4 received support: Job involvement was positively related to the composite measure of preference to extend career employment through phased retirement, $r = .20$, $p = .01$. Hypothesis 5 indicated that individuals with higher organizational commitment would report a stronger desire to extend career employment through phased retirement than those with lower organizational commitment. Hypothesis 5 received support: Organizational commitment was positively associated with the composite measure of phased retirement preference, $r = .31$, $p < .001$. Hypothesis 6 stated that individuals with higher career commitment would report a stronger desire to extend career employment through phased retirement than those with lower career commitment. Hypothesis 6 received partial support: The career resilience and career identity sub-dimensions of career-oriented commitment demonstrated positive relationships to the composite measure of phased retirement preference, $r = .18$, $p = .03$ and $r = .28$, $p < .01$, respectively; however, the career planning sub-dimension did not exhibit a significant association.[2]

Hypotheses 7 through 9 predicted that work-role attachment variables were positively related to total preferred work hours (measured in planned full-time hours and preferred part-time hours). Specifically, Hypothesis 7 stated that individuals with higher job involvement would report greater total preferred work hours than those with lower job involvement. Hypothesis 7 did not receive support: Job involvement did not exhibit a significant relationship to total preferred work hours. Hypothesis 8 indicated that individuals with higher organizational commitment would report greater total preferred work hours than those with lower organizational commitment. Hypothesis 8 received marginal support: Organizational commitment demonstrated a marginally significant positive relationship with total preferred work hours, $r = .15$, $p = .08$. Hypothesis 9 stated that individuals with higher career commitment would report greater total preferred work hours than those with lower career commitment. Hypothesis 9 received partial support: Career identity was positively associated with total preferred work hours, $r = .22$, $p = .01$.

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[2] Similar results for Hypotheses 4 through 6 were found when phased retirement preference was measured dichotomously (not reported in Table 1). Specifically, the dichotomous measure exhibited positive relationships with job involvement ($r = .30$, $p < .001$), career identity ($r = .23$, $p = .01$), career resilience (*marginally significant*, $r = .15$, $p = .06$), and organizational commitment ($r = .24$, $p < .01$). Similarly, there was no significant association between the dichotomous measure and career planning, $r = .10$, $p = .22$.

Table 1

Means, Standard Deviations, Correlations and Reliabilities for All Variables

Variable	M	SD	1	2	3	4	5	6	7	8	9	10	11	12
1. Age	55	5.9	---											
2. Planned Retirement Age	2.43	1.15	.45**	---										
3. Phased Retirement Preference	3.29	1.09	.15†	-.01	(.88)									
4. Total Preferred Work Hours	2703.62	9943.01	.49**	.90**	.10	---								
5. Financial Comfort	3.68	1.54	-.37**	-.65**	.01	-.62**	(.86)							
6. Financial Motive for Phased Retirement	2.79	1.04	-.10	.05	.36**	-.02	-.19*	---						
7. Health Satisfaction	5.34	1.51	.15†	-.05	.08	.06	.12	-.23**	(.91)					
8. Job Involvement	2.84	0.79	.11	.05	**.20****	.09	.00	.04	.01	(.86)				
9. Career Identity [b]	4.34	1.28	.15†	**.16†**	**.28****	**.22****	.03	-.08	.12	.60**	(.85)			
10. Career Planning [b]	4.10	1.14	-.05	-.11	.11	-.05	.16*	-.11	.16*	.38**	.47**	(.83)		
11. Career Resilience [b]	4.38	1.38	.26**	.04	**.18***	.07	.09	-.08	.28**	.27**	.23**	.26**	(.84)	
12. Organizational Commitment	4.52	1.40	.14†	**.16†**	**.31****	**.15†**	.06	.04	.13†	.46**	.43**	.33**	.44**	(.90)

Note. *Ns* range from 136 to 151. †*p* < .10. **p* < .05. ***p* < .01. Coefficient alphas are reported along the diagonal. Correlations that provide support for hypotheses are in bold. [b] denotes a dimension of career-oriented commitment.

However, career resilience and career planning did not relate to total preferred work hours.

For exploratory purposes, additional correlational analyses were conducted to ascertain whether positive relationships exist between work-role attachment variables and the two components of total preferred work hours: planned full-time hours (“F”) and preferred part-time hours (“P”) (not reported in Table 1). Results indicated that planned full-time hours was not significantly related to job involvement (r = .02, p = .86), career identity (r = .10, p = .20), career resilience (r = .00, p = 1.0), career planning (r = -.15, p = .08), or organizational commitment (r = .06, p = .47). Further, preferred part-time hours was not significantly associated with job involvement (r = .13, p = .11), career identity (r = .06, p = .44), career resilience (r = .02, p = .78), career planning (r = .11, p = .17), or organizational commitment (r = .10, p = .23).

Hierarchical Regression Analyses

Hypotheses 10 through 12 were tested with hierarchical regression analyses. Hypothesis 10 stated that work-role attachment variables would collectively contribute to variation in planned retirement age after controlling for age, finance, and health. To test Hypothesis 10, planned retirement age was regressed on age, financial comfort, and health satisfaction in step one, and work-role attachment variables in step two.

Results are reported in Table 2. Hypothesis 10 received support: Work-role attachment variables collectively explained an additional 5% of the variation in planned retirement age in the presence of control variables, ΔF (5, 129) = 2.62, p = .03. Organizational commitment (β = .18, p = .02) and career identity (β = .17, p = .04) explained unique variation in planned retirement age in the presence of job involvement, career resilience, career planning, age, health satisfaction, and financial comfort.

Hypothesis 11 stated that work-role attachment variables would collectively explain variation in preference to extend careers through phased retirement after controlling for age, finance, and health. Hypothesis 11 was tested with two hierarchical regression analyses. For both analyses phased retirement preference was regressed on age, financial comfort, and health satisfaction in step one, and work-role attachment variables in step two. However, one of the analyses included an additional control variable in step one: financial motive for phased retirement (see Table 3.2). The other analysis did not include financial motive for phased retirement in step one (see Table 3.1).

Hypothesis 11 received support: Results from both analyses revealed that work-role attachment variables collectively explained an additional 10% of the variation in phased retirement preference beyond control variables: ΔF (5, 139) = 3.92, $p < .01$ for analysis with financial motive for phased retirement, and ΔF (5, 142) = 3.34, $p < .01$ for analysis without. In the analysis without financial motive for phased retirement, organizational commitment ($\beta = .22$, $p = .03$) and career identity ($\beta = .19$, $p = .07$, *marginally significant*) explained unique variation in phased retirement preference in the presence of job involvement, career resilience, career planning, age, health, and financial comfort. Similar (though not identical) results were found for the analysis that included financial motive for phased retirement [organizational commitment ($\beta = .17$, $p = .06$, *marginally significant*) and career identity ($\beta = .25$, $p = .01$)].

Hypothesis 12 stated that work-role attachment variables would collectively explain variation in total preferred work hours after controlling for age, finance, and health. Like Hypothesis 11, Hypothesis 12 was tested with two hierarchical regression analyses. Phased retirement preference was regressed on age, financial comfort, and health satisfaction in step one, and work-role attachment variables in step two. One of the analyses included financial motive for phased retirement in step one (see Table 4.2); the other analysis did not (see Table 4.1).

Hypothesis 12 received support: Results from both analyses revealed that work-role attachment variables contributed to an additional 5% of the variation in total preferred work hours beyond control variables: ΔF (5, 126) = 2.63, p = .03 for analysis with financial motive for phased retirement, ΔF (5, 129) = 2.50, p = .03 for analysis without. For both analyses, career identity was uniquely related to total preferred work hours in the presence of job involvement, career resilience, career planning, and control variables (βs = .22, ps < .01).

Post-Hoc Analyses

Zero-order correlations *appeared* stronger between each work-role attachment variable and phased retirement preference than for the corresponding work-role attachment variable and planned retirement age (see Table 1, p. 35). Therefore, post-hoc analyses were conducted to assess whether the difference in magnitude of these correlations was statistical significant. Since correlations between work-role attachments and phased retirement preference and between work-role attachments and planned retirement age were calculated based on information from the *same* sample, it was necessary to conduct Williams *t* tests to determine whether dependent correlations were significantly different from one another (See Chen & Popovich, 2002, p. 24, for William's *t* formula).

The Williams *t* test formula was manually inputted into Microsoft Excel 2010. *T* statistics computed from the Williams *t* test were compared to critical *t* values for two-tailed tests, $t_{.05}$ (135) = ±1.978, as well as one-tailed tests, $t_{.05}$ (135) = +1.656. For a two-tailed test, statistical support was found for a stronger positive association between a particular work-role attachment variable and phased retirement preference than for planned retirement age if a William's *t* statistic was positive and greater than +1.978. For a one-tailed test, statistical support was found for a stronger positive relationship between a particular work-role attachment variable and phased retirement preference if a William's *t* statistic exceeded +1.656.

Results from the Williams *t* tests indicated that none of the computed *t* statistics were equal to or greater than +1.978, and therefore, no support was found for stronger positive bivariate relationships between work-role attachment variables and phased retirement preference than for planned retirement age *for two-tailed t tests*. However, for *one-tailed t tests*, there was evidence that job involvement and career resilience had stronger positive correlations with phased retirement preference compared to planned retirement age: difference in *rs* for job involvement = .15, $t_{obtained}$ = 1.774, $p < .05$; difference in *r*s for career resilience = .14, t_{obtained} = 1.769, $p < .05$.

Table 2

Hierarchical Regression of Planned Retirement Age on Control Variables and Work-role Attachment Variables

	Step 1			Step 2		
Predictor	β	R^2_{Adj}	ΔR^2	β	R^2_{Adj}	ΔR^2
Control Variables		.47**	.48**		.50**	.05*
Age	.24**			.21**		
Health Satisfaction	.03			.004		
Financial Comfort	-.57**			-.58**		
Work-role Attachment Variables						
Job Involvement				-.11		
Career Identity [b]				.17*		
Career Planning [b]				-.06		
Career Resilience [b]				-.04		
Organizational Commitment				.18*		

N = 138. *p < .05. **p < .01. [b] denotes a dimension of career-oriented commitment. R^2_{Adj} = Adjusted R^2.

Table 3.1

Hierarchical Regression of Phased Retirement Preference on Control Variables and Work-role Attachment Variables: Analysis does not include Financial Motive for Phased Retirement

	Step 1			Step 2		
Predictor	β	R^2_{Adj}	ΔR^2	β	R^2_{Adj}	ΔR^2
Control Variables		.01	.03		.08**	.10**
Age	.17†			.10		
Health Satisfaction	.04			.01		
Financial Comfort	.07			.03		
Work-role Attachment Variables						
Job Involvement				-.01		
Career Identity [b]				.19†		
Career Planning [b]				-.06		
Career Resilience [b]				.03		
Organizational Commitment				.22*		

N = 151. †p < .10. *p < .05. **p < .01. [b] denotes a dimension of career-oriented commitment. R^2_{Adj} = Adjusted R^2.

Table 3.2

Hierarchical Regression of Phased Retirement Preference on Control Variables and Work-role Attachment Variables: Analysis includes Financial Motive for Phased Retirement in Step 1

	Step 1			Step		
Predictor	β	R^2_{Adj}	ΔR^2	β	R^2_{Adj}	ΔR^2
Control Variables		.19**	.21**		.26**	.10**
Age	.25**			.18*		
Health Satisfaction	.12			.09		
Financial Comfort	.16*			.12		
Financial Motive for Phased	.44**			.43**		
Work-role Attachment Variables						
Job Involvement				-.03		
Career Identity [b]				.25**		
Career Planning [b]				-.05		
Career Resilience [b]				.03		
Organizational Commitment				.17†		

N = 149. †$p < .10$. *$p < .05$. **$p < .01$. [a] denotes a dimension of career-oriented commitment. R^2_{Adj} = Adjusted R^2.

Table 4.1

Hierarchical Regression of Total Preferred Work Hours on Control Variables and Work-role Attachment Variables: Analysis does not include Financial Motive for Phased Retirement

Predictor	Step 1 β	Step 1 R^2_{Adj}	Step 1 ΔR^2	Step 2 β	Step 2 R^2_{Adj}	Step 2 ΔR^2
Control Variables		.47**	.48**		.50**	.05*
Age	.27**			.24**		
Health Satisfaction	.14*			.11†		
Financial Comfort	-.55**			-.56**		
Work-role Attachment Variables						
Job Involvement				-.07		
Career Identity [b]				.22**		
Career Planning [b]				-.04		
Career Resilience [b]				-.05		
Organizational Commitment				.11		

N = 138. †p < .10. *p < .05. **p < .01. [b] denotes a dimension of career-oriented commitment. R^2_{Adj} = Adjusted R^2.

Table 4.2

Hierarchical Regression of Total Preferred Work Hours on Control Variables and Work-role Attachment Variables: Analysis includes Financial Motive for Phased Retirement in Step 1

	Step 1			Step 2		
Predictor	β	R^2_{Adj}	ΔR^2	β	R^2_{Adj}	ΔR^2
Control Variables		.47**	.48**		.50**	.05*
Age	.26**			.24**		
Health Satisfaction	.13*			.11†		
Financial Comfort	-.56**			-.57**		
Financial Motive for Phased	-.05			-.04		
Work-role Attachment Variables						
Job Involvement				-.06		
Career Identity [b]				.22**		
Career Planning [b]				-.06		
Career Resilience [b]				-.05		
Organizational Commitment				.12		

N = 136. †p < .10. *p < .05. **p < .01. [b] denotes a dimension of career-oriented commitment. R^2_{Adj} = Adjusted R^2.

DISCUSSION

Phased retirement has become a hot topic in recent years – A Google search of the term "phased retirement" returned over 55,000 results. Despite its popularity, phased retirement has not received much scholarly attention from a work-role attachment perspective. This study is the first to extend predictions from work-role attachment theory to phased retirement preferences.

Results are summarized in Table 5. This table shows that of the twelve hypotheses tested in this study, 10 received complete, marginal, or partial support; only two received no support. As mentioned in the results section, positive relationships between career identification and planned retirement age, organizational commitment and planned retirement age, and organizational commitment and total preferred work hours were marginally significant (as defined as statistically significant at the alpha .10 level, two-tailed test). Marginal statistical support for these positive relationships may be attributed to an insufficient sample size (*n*s = 138), which is known to attenuate statistical power. (See limitations section for further detail.)

The findings of this study generally support the predictions that individuals with stronger work-role attachment plan a later traditional retirement, report a stronger preference to work past the planned retirement age in phased retirement, and desire to work more total hours throughout their career spans. Career identification and organizational commitment were positively related to phased retirement preference and planned retirement age, even after controlling for age, health, and finance. Further, career identification was positively associated with total preferred work hours in the

Table 5

Summarized Results of Hypothesis Testing

Hypothesis	Support
1. Job involvement is positively related to planned retirement age.	No
2. Organizational commitment is positively related to planned retirement age.	Marginal
3. Career commitment is positively related to planned retirement age.	Partial
4. Job involvement is positively related to the desire to continue working in phased retirement beyond the planned retirement age.	Yes
5. Organizational commitment is positively related to the desire to continue working in phased retirement beyond the planned retirement age.	Yes
6. Career commitment is positively related to the desire to continue working in phased retirement beyond the planned retirement age.	Partial
7. Job involvement is positively related to total preferred work hours.	No
8. Organizational commitment is positively related to total preferred work hours.	Marginal
9. Career commitment is positively related to total preferred work hours.	Partial
10. Job Involvement, organizational commitment, and career commitment collectively contribute to variation in planned retirement age, after controlling for age, finance, and health.	Yes
11. Job Involvement, organizational commitment, and career commitment collectively contribute to variation in preferences to work beyond the planned retirement age in phased retirement, after controlling for age, finance, and health.	Yes
12. Job Involvement, organizational commitment, and career commitment collectively contribute to variation in total preferred work hours, after controlling for age, finance, and health.	Yes

Note. "Yes" denotes support for a hypothesis at the alpha .05 level. "Marginal" denotes support for a hypothesis at the alpha .10 level. "Partial" indicates support for at least one (but not all) of the dimensions of career-oriented commitment at the alpha .05 or the alpha .10 level. "No" indicates there is no support for a hypothesis (i.e., $p > .10$).

presence of control variables. These positive relationships are consistent with work-role attachment theory and support recent interpretations of continuity theory (Kim & Feldman, 2000; Gobeski & Beehr, 2009).

For example, Kim and Feldman (2000) proposed that a part-time work option allows dedicated workers to achieve continuity of valued work activities when factors beyond their control, such as declining mental and physical ability, limit the ability to work full-time (p. 1196). In support of this proposition, a study by Heindel, Adams, and Lepisto (1999) revealed that individuals with stronger career and organizational commitment report stronger intentions to seek continuity through bridge employment (part-time work with a different employer) when they are no longer willing or able to work full-time for a career employer. The present study is the first to reveal that individuals with stronger career identification and organizational commitment report greater desires to continue working in part-time employment with the *same employer* (phased retirement) when they no longer expect that they will be willing or able to work full-time.

After controlling for the effects of age, health, finance, organizational commitment, and career commitment, job involvement was not related to any of the criteria in the present study. In retrospect, it seems that job involvement may not adequately reflect an individual's affective attachment towards a job. Adams, Prescher, Beehr, and Lepisto (2002) speculated that level of job involvement might have more correspondence to an individual's workload than to his or her desire to remain on the job (p. 133). For example, individuals who report that they strongly agree with the statement that they “live, eat, and breathe” their job (an item that measures job involvement) might be merely indicating that they work long hours. Future conceptualizations of work-role attachment theory may include job-specific constructs other than job involvement, such as “job attachment” and “job satisfaction.”

Directions for Future Research

Future research could test whether phased retirement preferences are manifested in actual participation in a phased retirement program. Several steps would be needed to accomplish this task. First, the future investigator might find a large organization that already has a phased retirement program in some of its locations. Second, the potential investigator might ask the company for data on annual retirement rates prior to implementation of the program, during its implementation, and after the implementation of the program.

Ideally, the investigator would want to collect data on a location/s of a company that has implemented the phased retirement program as well as a location/s that has not implemented the phased retirement program (which could serve as a control). With this information, the future investigator could determine whether the implementation of phased retirement coincided with a greater increase in the retention of individuals with stronger work-role attachment than for individuals with weaker work-role attachment.

Of course, there would be several difficulties associated with the execution of this type of research design. One potential challenge would be to find an organization that has records of annual retirement rates as well as records of work attitudes of individual workers. Gaining access to this sensitive information is another potential difficulty.

Further, it may be difficult to obtain a large enough sample size to draw meaningful conclusions from the data.

One way to avoid such methodological issues could be to conduct research at the national level using one of the many publicly available data sets. For example, the Health and Retirement Study (HRS) data includes a wealth of information on a large sample of individuals located throughout the United States. The HRS includes information on traditional as well as alternative forms of retirement (bridge employment and phased retirement). Moreover, the HRS provides a longitudinal assessment throughout the span of several years, allowing for a more powerful statistical technique than cross-sectional research. Future studies may use such data sets to investigate antecedents of participation in phased retirement.

One research question that was not addressed in the present study is whether the implementation of a phased retirement program would cause some employees to exit earlier than they would without the program. In the present study participants were not given the option to choose *when* they desired phased retirement. Instead, they were required to rate whether they preferred phased retirement *after* their intended retirement date. It is conceivable that the availability of phased retirement would inspire some individuals to discontinue full-time work sooner than if phased retirement were not available. Indeed, some evidence reveals that phased retirement may accelerate the departure of certain types of employees by enticing them to stop working full-time in advance of the planned retirement date (Allen, Clark, & Ghent, 2004).

Another direction for further research is to explore psychological and socio-economic factors that affect the preference/decision to participate in phased retirement versus to continue working full-time or permanently retire. Phased retirement may be considered a partial role transition between work and retirement. Perhaps the decision on whether to continue working full-time versus part-time hinges on the relative influence of work versus non-work role activities. According to role theory and continuity theory, individuals should desire to spend more time in activities they value most and spend the least amount of time performing activities that they value least. Theoretically, individuals who have strong interests in work activities (i.e., strong work-role attachment) but no interest in non-work activities (e.g., no attachment to family and/or leisure activities) should desire to continue working full-time. Conversely, individuals who have strong interests in non-work activities and no interest in work activities should desire to permanently retire as soon as situational constraints (e.g., financial pressures to remain on the job) would allow them to. Further, individuals who have strong interest in *both* work and non-work domains should desire to continue work at a part-time rate (i.e., phased retirement).

Further research is necessary to evaluate whether improvement in physical and psychological well-being occurs for dedicated workers that participate in phased retirement. A recent longitudinal study by Wang (2007) provided some evidence that bridge employment facilitated adjustment to retirement, presumably by easing the "potentially disruptive transition out of the labor force and [providing] retirees extra time to accommodate the lifestyle changes caused by retirement," (p. 458). Indeed, in the present study many respondents reported that they preferred to participate in phased retirement to “begin the slow steady process of living at a different income level.” Still others said phased retirement may help them avoid mental and physical health problems caused by an abrupt transition from work to non-work. For example, one respondent made the following observation: “Most people who work all their lives and then just retire and do nothing usually have health problems. Phasing into retirement would keep [my] mind growing and learning daily.” Another stated: “I like structure in my life…[An abrupt retirement] seems extreme. A phased approach would probably work better for me. It would also help me maintain social interaction with colleagues.” Such research is necessary to affirm the beliefs of respondents in this study by examining whether individuals who take phased retirement have significantly better financial, psychological, and/or social adjustment in retirement. In line with Wang (2007), these studies could employ a repeated measures longitudinal design and Latent Growth Curve modeling to determine whether individuals who participate in phased retirement have better adjustment to retirement than those who abruptly retire.

Moreover, further research is necessary to explore whether work attitudes affect the decision to participate in phased retirement versus bridge employment. For an individual with strong organizational commitment, phased retirement may be preferable to bridge employment because it does not involve the loss of desirable organizational contacts, perquisites, and social networks that may occur if this individual were to take part-time employment for a different organization (i.e., a bridge job). This notion is consistent with role theory, which suggests that individuals with stronger organizational commitment desire to continue working for the same organization (Barnes-Farrell, 2003). Further, some individuals with stronger career identification may desire phased retirement over bridge employment because phased retirement offers greater opportunity for career advancement (Chen & Scott, 2006). On the other hand, other individuals with strong career identification may see bridge employment as a means for gaining new contacts and experience that can advance the career.

Limitations

The present study examined phased retirement preferences rather than actual participation in a phased retirement program. An examination of preferences rather than actual participation has several advantageous. First, it permits the study of attitudes and opinions about phased retirement in populations of workers that do not typically have phased retirement programs (such as the non-faculty workers examined in this study.) Because there is some evidence that phased retirement may one day become more widespread, data on such populations may become more useful in the future. Further, an examination of preferences can produce more generalizable results. Unlike actual participation, preferences can be measured and defined independent of characteristics that differ between phased retirement programs.

The “generalizable” nature of preferences may also be viewed as a limitation in that it is difficult to gauge the extent to which individual preferences for phased retirement predict actual decisions to participate in phased retirement. Desires to engage in phased retirement may be constrained by organizational policies that affect eligibility to participate. For example, organizations that offer phased retirement require that their employees acquire a certain number of years of service before they can participate in phased retirement (Allen, Clark, & Ghent, 2004).

Further, participants were not given a detailed assessment on how participation in phased retirement would affect their financial well-being. It is well-established that eligibility to participate in phased retirement, as well as the ability to collect pension benefits during phased employment, are important determinants of the decision to participate (Byham, 2007). Anecdotal reports from the present study indicate that the ability to collect and/or accrue a full pension benefit during phased retirement and the ability to receive health care coverage during phased retirement were major considerations in the decision to participate. Attempts to control for these financial motives may have introduced an element of artificiality.

Statistical power may have been attenuated by the small sample sizes used in the present study. Statistical power is defined as the probability of detecting a statistically significant relationship given that a true relationship exists. Statistical power ($1 - \beta$) is the converse of the probability of committing a Type II error (β) – the probability of failing to find statistical support for a relationship given that a true relationship exits. A study may have inadequate power for many reasons, including a small effect size, a small sample size, and/or a small alpha (i.e., probability of detecting a statistically significant relationship when a true relationship does *not* exist). Assuming effect sizes found in this study are accurate estimates of population correlations (rs = ρs), the sample size (n = 138) might not have been large enough to provide sufficient power to detect these relationships. A study is considered to have *insufficient* statistical power if the value for power is less than the conventional standard of .80 (Cohen, 1992; Mazen, Hemmasi, & Lewis, 1985). Thus, a study has insufficient power if the probability of correctly detecting a true relationship is less than 80%.

Statistical power was tested for marginally significant bivariate relationships in the present study: career identity and planned retirement age, $r = .16$; organizational commitment and planned retirement age, $r = .16$; and organizational commitment and total preferred hours, $r = .15$, $ps \leq .10$. Two post-hoc power analyses were conducted using G*Power, version 3.1.2 (not reported in the results section). Both analyses assumed a sample size of 138 and a two-tailed *t*-test with an alpha of .05. The first power analysis revealed that statistical power was .47 for bivariate associations between career identity and planned retirement age and between organizational commitment and planned retirement age (effect size is $r = .16$ for both bivariate relationships). This result indicates that, assuming a true bivariate association exists, an exact replication of this study would detect a statistically significant positive relationship between career identity and planned retirement age and between organizational commitment and planned retirement age less than half of the time (i.e., 47%). A second post-hoc analysis was conducted to ascertain the power achieved for the bivariate association between organizational commitment and total preferred hours (effect size of $r = .15$). Results from the analysis revealed a power of 0.42. Thus, assuming a true relationship exists, an exact replication of this study would result in a 42% chance of detecting a positive bivariate association between organizational commitment and total preferred hours. Taken together, these results indicate that the power achieved for all three marginally significant relationships was below the acceptable criterion of 0.80. Assuming effect sizes in this study are true estimates of population correlations, there is a high probability that stronger support would have been revealed for these relationships if this study had used a larger sample size. Indeed, additional analyses revealed that sample sizes of 301 and 343 would be necessary to achieve a power of 0.80 for effect sizes $r = .16$ and r = .15.

CONCLUSION

The findings of this study lend some support to the widely-held contention that phased retirement may be used as a retention tool for dedicated workers (i.e., employees with strong work-role attachment). Encouraging such workers to extend their careers by means of phased retirement can yield many benefits for the employees and their employers. It gives the employee an opportunity to gradually gain familiarity with the retirement lifestyle while keeping desirable workplace contacts and professional status. In some cases it may even help the employee avoid the psychological stress that is sometimes associated with sudden retirement. For the employer, phased retirement can help to prevent skill shortages and the loss of institutional knowledge. It can also save the cost of finding replacement workers and retraining them.

My research suggests that it is employees with strong work-role attachment who are most likely to desire phased retirement when they no longer can or want to work full-time. This is significant because research has revealed that stronger work attitudes are linked to higher productivity (e.g., Judge, Thoresen, Bono, & Patton, 2001) and organizational citizenship behaviors (e.g., Organ & Ryan, 1995).

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APPENDIX A: VARIABLE AND ITEM DESCRIPTIVE STATISTICS

Variable and Item Means and Standard Deviations for Planned Retirement Age, Preferences to Extend Careers through Phased Retirement, Total Preferred Work Hours, Job Involvement, and Career-oriented Commitment

Item	N	M	SD
Planned Retirement Age	138	2.43	1.15
a7. Please type in the age that you plan to retire.	138	62.76	6.16
Preferences to Extend Careers through Phased Retirement	151	3.29	1.09
b1. A part-time work option would encourage me to work past my planned age of retirement.	150	3.35	1.27
b2. I would prefer to extend my career through phased retirement.	151	3.13	1.17
b3. The availability of phased retirement would offer me the flexibility needed to continue my career.	151	3.39	1.19
Total Preferred Work Hours	138	2703.62	9943.01
Job Involvement	151	2.84	0.79
e1. The most important things that happen to me involve my present job.	151	2.75	1.30
e2. To me, my job is only a small part of who I am. (R)	150	2.28	1.17
e3. I am very much involved personally in my job.	151	4.15	1.11
e4. I live, eat, and breathe my job.	151	2.05	1.07
e5. Most of my interests are centered around my job.	150	2.09	1.05
e6. I have very strong ties with my present job which would be very difficult to break.	151	2.87	1.38
e7. Usually, I feel detached from my job. (R)	150	4.59	1.15
e8. Most of my personal life goals are job-oriented.	150	2.18	1.08
e9. I consider my job to be very central to my existence.	150	2.43	1.29
e10. I like to be absorbed in my job most of the time.	149	3.00	1.27
Career-oriented Commitment	---	---	---
f1. My line of work/career field is an important part of who I am.[a]	148	4.30	1.53
f2. This line of work/career field has a great deal of personal meaning to me.[a]	151	4.54	1.50
f3. I do not feel "emotionally attached" to this line of work/career field. (R) [a]	151	4.09	1.64
f4. I strongly identify with my chosen line of work/career field.[a]	149	4.44	1.56
f5. I do not have a strategy for achieving my goals in this line of work/career. (R)[b]	150	4.29	1.39
f6. I have created a plan for my development in this line of work/career field.[b]	148	3.93	1.46
f7. I do not identify specific goals for my development in this line of work/career field. (R)[b]	150	4.06	1.33
f8. I do not often think about my personal development in this line of work/career field. (R)[b]	150	4.11	1.43
f9. The costs associated with my line of work/career field sometimes seem too great. (R)[c]	149	4.45	1.53
f10. Given the problems I encounter in this line of work/career field, I sometimes wonder if I get enough out of it. (R)[c]	150	4.21	1.73
f11. Given the problem in this line of work/career field, I sometimes wonder if the personal burden is worth it. (R)[c]	150	4.28	1.72
f12. The discomforts associated with my line of work/career field sometimes seem too great. (R)[c]	151	4.60	1.76

Note. (R) denotes reverse-coded items. [a] denotes career identity. [b] denotes career planning. [c] denotes career resilience. Letters correspond to a section in the survey and numbers refer to the item location within the section (see Appendix B for survey). For example, "f12" refers to the 7[th] item found in Section F of the survey.

APPENDIX A (CONTINUED)

Variable and Item Means and Standard Deviations for Organizational Commitment, Financial Motive for Phased Retirement, Financial Comfort, Health Satisfaction, and Age

Item	N	Mean	SD
Organizational Commitment	151	4.52	1.40
h1. I would be very happy to spend the rest of my career with Ohio University.	151	5.67	1.74
h2. I enjoy discussing Ohio University with people outside it.	149	5.37	1.70
h3. I really feel as if Ohio University's problems are my own.	149	3.60	1.90
h4. I think that I could easily become as attached to another organization as I am to this one. (R)	151	3.70	1.68
h5. I do not feel like 'part of the family' at Ohio University. (R)	149	4.09	2.00
h6. I do not feel 'emotionally attached' to Ohio University. (R)	149	4.45	1.89
h7. Ohio University has a great deal of personal meaning to me.	150	4.88	1.68
h8. I do not feel a strong sense of belonging to Ohio University. (R)	150	4.33	1.90
Financial Motive for Phased Retirement			
d7. To what extent is your preference to work beyond your planned retirement date in phased employment based on financial reasons?	149	2.79	1.04
Financial Comfort	151	3.68	1.54
g1. If I were to retire at age 55 I would be financially comfortable.	151	2.40	1.73
g2. If I were to retire at age 60 I would be financially comfortable.	150	3.09	1.92
g3. If I were to retire at age 65 I would be financially comfortable.	150	4.35	1.90
g4. If I were to retire at age 70 I would be financially comfortable.	150	4.90	1.82
Health Satisfaction	151	5.34	1.51
g10. Overall, I am very satisfied with my health.	150	5.20	1.69
g11. My health is better than most people my age.	150	5.07	1.66
g12. My health limits my work. (R)	149	5.06	1.75
g13. Generally speaking, my health is very good.	151	5.48	1.67
Age			
i1. Please type in your age (in years).	151	54.86	5.91

Note. (R) denotes reverse-coded items. Letters correspond to a section in the survey and numbers refer to the item location within the section (see Appendix B for survey). For example, "g13" refers to the 13th item found in Section F of the survey.

APPENDIX B: SURVEY INSTRUMENT

Thoughts and Opinions about Retirement [3]

Please read the following letter completely before you begin the survey.

Dear Ohio Classified Employee:

I am a graduate student in the field of organizational psychology at Ohio University, and am conducting a survey to assist in the completion of my master's degree. The survey is designed to find out how classified employees at Ohio University think and feel about their jobs, organization, and retirement. Of particular importance to this study is a concept referred to as phased retirement. “Phased,” or gradual, retirement occurs when a worker stops working full-time to work part-time for a period of time before completely retiring. I am interested in your thoughts and opinions about this alternative form of retirement. Additionally, I am interested in your attitudes and opinions toward your job, Ohio University, and traditional retirement.

Survey data may be provided to university personnel who are interested in improving retirement practice and policy at Ohio University. The survey will take approximately 10-15 minutes to complete. Individual responses will be completely anonymous and confidential. Only summarized data -- for example, averages and percentages -- will be used.

Participation in this survey is voluntary, and you may withdraw from the study at any time. There is no penalty for the type of response given. Your participation in this survey is important, encouraged, and greatly appreciated.

If you have any questions, please contact David Fried, Master's Degree Candidate (216-856-1957, df231307@ohio.edu); George Cheripko, Chair of the Classified Senate (740-593-9828, cheripko@ohio.edu); or Rodger Griffeth, Department of Psychology (678-637-9975, griffeth@ohio.edu).

Sincerely yours,

David Fried, Master's Degree Candidate, Department of Psychology

George Cheripko, Chair of Classified Senate

Rodger W. Griffeth, Ph.D., Department of Psychology

[3] This survey was administered to participants over the internet. Although ordering of survey items and response categories are consistent with the online version, the format differs.

When developing a survey some redundancy is necessary for accurate analysis of data, and certain questions may appear similar to other questions. In the following sections, please answer each item as best you can by checking, or filling in, the answer that most accurately describes your thoughts and feelings.

[Save and continue later] [Submit]

Click 'Save and continue later' if you would like to continue where you left off at a later time (be sure to bookmark this page or copy the URL) or 'Submit' when you are finished.

SECTION A: The following section contains questions that ask you to describe your thoughts and feelings toward retirement. Please read each question and choose one answer per question. It is important that you respond to a question even if it appears similar to others.

1. I am thinking about retiring from my job.
   Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

2. I think about retiring...
   Never Seldom-----Occasionally-----Often Always

3. I expect to begin collecting a pension in the near future.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

4. I would like to retire in the near future.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

5. I plan to retire in the near future.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

6. I expect to retire in the near future.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

7. Please type in the age that you plan to retire.
   ____

SECTION B: Some companies allow their workers to "retire" from full-time employment to work part-time before completely retiring. This phenomenon is referred to as "phased retirement." The following section asks questions about your thoughts and opinions toward working in phased retirement. Please rate the extent to which you agree or disagree with each statement, using the following five response categories: Strongly Disagree, Disagree, Neither Agree nor Disagree, Agree, and Strongly Agree.

1. A part-time work option would encourage me to work past my planned age of retirement.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

2. I would prefer to extend my career through phased retirement.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

3. The availability of phased retirement would offer me the flexibility needed to continue my career.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

4. I do not wish to work in phased retirement at any point in my career.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

SECTION C: Please rate the extent to which you agree or disagree with each statement, using the same five response categories: Strongly Disagree, Disagree, Neither Agree Nor Disagree, Agree, and Strongly Agree.

1. I feel fairly satisfied with my present job.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

2. Most days I am enthusiastic about my work.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

3. Each day at work seems like it never ends.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

4. I find real enjoyment in my work.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

5. I consider my job to be rather unpleasant.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

6. I spent a lot of time looking for a job alternative during the last 12 months.
Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

7. I devoted much effort to looking for other jobs during the last 12 months.
   Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

8. I focused my time and effort on job search activities during the last 12 months.
   Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

9. I gave my best effort to find a new job during the last 12 months.
   Strongly Disagree-----Disagree-----Neither Agree Nor Disagree-----Agree-----Strongly Agree

SECTION D: Please answer the following questions with "yes", "no", or "not sure."

1. I would prefer to enroll in phased retirement earlier than my expected retirement age.
   Yes-----No-----Not Sure

2. The number of years of service I have with the Ohio Public Employee Retirement System (OPERS) would have an important influence on my decision to participate in phased retirement.
   Yes-----No-----Not Sure

3. The type of pension I have affects my preference to enroll in phased retirement.
   Yes-----No-----Not Sure

4. I would be interested in working past my planned age of retirement in phased retirement only if I were able to collect a full pension during phased retirement.
   Yes-----No-----Not Sure

5. I plan to completely retire from Ohio University when I become eligible to collect a full pension.
   Yes-----No-----Not Sure

6. I would participate in phased retirement even if it resulted in a delay in the collection of my pension.
   Yes-----No-----Not Sure

7. To what extent is your preference to work past your planned age of retirement in phased employment based on financial reasons?
   Not at all-----It is a reason, but it is not the primary reason-----It is the primary reason, but it is not the only reason-----It is the only reason I would prefer to work past my planned retirement age in phased employment

8. I would prefer to work beyond my expected date of retirement in phased employment. (If 'no" skip questions 9, 10, and 11).
   Yes-----No-----Not Sure

9. Please type in the number of years you would prefer to work in phased retirement, assuming you would start phased employment after your planned retirement date.

____

10. Please indicate the number of hours per week you would prefer to work in phased retirement, assuming you would start phased employment after your planned retirement date.

I do not wish to work for Ohio University after my planned retirement date (0 hours)-----0-9 hours per week-----10-17 hours per week-----18-25 hours per week-----26-34 hours per week

11. I would participate in phased retirement even if it meant that I would perform a different job than my current job.

Yes-----No-----Not Sure

SECTION E: This section contains statements about your attitudes towards your current job. Please read the statements and select the answer that most accurately describes your attitudes toward your current job, using the following six response categories: Strongly Disagree, Disagree, Somewhat Disagree, Somewhat Agree, Agree, and Strongly Agree. It is important that you respond to an item even if it appears similar to others.

1. The most important things that happen to me involve my present job.

Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

2. To me, my job is only a small part of who I am.

Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

3. I am very much involved personally in my job.

Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

4. I live, eat, and breathe my job.

Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

5. Most of my interests are centered around my job.

Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

6. I have very strong ties with my present job which would be very difficult to break.

Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

7. Usually, I feel detached from my job.
   Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

8. Most of my personal life goals are job-oriented.
   Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

9. I consider my job to be very central to my existence.
   Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

10. I like to be absorbed in my job most of the time.
    Strongly Disagree-----Disagree-----Somewhat Disagree-----Somewhat Agree-----Agree-----Strongly Agree

SECTION F: This section asks questions about your attitudes toward your profession (line of work or career field). Please read the items and indicate the extent to which you agree or disagree with each statement, using the following seven response categories: Strongly Disagree, Moderately Disagree, Somewhat Disagree, Neither Agree Nor Disagree, Somewhat Agree, Moderately Agree, and Strongly Agree.

1. My line of work/career field is an important part of who I am.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

2. This line of work/career field has a great deal of personal meaning to me.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

3. I do not feel "emotionally attached" to this line of work/career field.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

4. I strongly identify with my chosen line of work/career field.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

5. I do not have a strategy for achieving my goals in this line of work/career.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

6. I have created a plan for my development in this line of work/career field.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

7. I do not identify specific goals for my development in this line of work/career field.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

8. I do not often think about my personal development in this line of work/career field.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

9. The costs associated with my line of work/career field sometimes seem too great.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

10. Given the problems I encounter in this line of work/career field, I sometimes wonder if I get enough out of it.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

11. Given the problem in this line of work/career field, I sometimes wonder if the personal burden is worth it.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

12. The discomforts associated with my line of work/career field sometimes seem too great.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

SECTION G: This section contains questions regarding your thoughts and opinions toward your physical health and financial comfort. Please indicate the extent to which you agree or disagree with each statement, using the same seven response categories: Strongly Disagree, Moderately Disagree, Somewhat Disagree, Neither Agree Nor Disagree, Somewhat Agree, Moderately Agree, and Strongly Agree.

1. If I were to retire at age 55 I would be financially comfortable.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

2. If I were to retire at age 60 I would be financially comfortable.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

3. If I were to retire at age 65 I would be financially comfortable.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

4. If I were to retire at age 70 I would be financially comfortable.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

5. I worry about the standard of living I will have when I retire.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

6. I worry about having enough income when I retire.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

7. I am satisfied with what my family income will be when I retire.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

8. I can financially afford to retire.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

9. One reason I continue to work is because I can’t afford to retire.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

10. Overall, I am very satisfied with my health.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

11. My health is better than most people my age.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

12. My health limits my work.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

13. Generally speaking, my health is very good.
Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

SECTION H: This section asks questions about your attitudes toward Ohio University. Please read the items and indicate the extent to which you agree or disagree with each statement, using the same seven response categories: Strongly Disagree, Moderately Disagree, Somewhat Disagree, Neither Agree Nor Disagree, Somewhat Agree, Moderately Agree, and Strongly Agree.

1. I would be very happy to spend the rest of my career with Ohio University.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

2. I enjoy discussing Ohio University with people outside it.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

3. I really feel as if Ohio University's problems are my own.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

4. I think that I could easily become as attached to another organization as I am to this one.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

5. I do not feel like 'part of the family' at Ohio University.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

6. I do not feel 'emotionally attached' to Ohio University.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

7. Ohio University has a great deal of personal meaning to me.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

8. I do not feel a strong sense of belonging to Ohio University.
   Strongly Disagree-----Moderately Disagree-----Somewhat Disagree-----Neither Agree nor Disagree-----Somewhat Agree-----Moderately Agree-----Strongly Agree

SECTION I: Demographics

1. Please type in your age (in years).
   ____

2. Please type in the number of family members that are financially dependent on you.

____

3. Please type in the number of years of service you have with the Ohio Public Employee Retirement System (OPERS).

____

4. Please type in the number of additional years of service you need to qualify for a full pension.

____

5. Please type in the number of years you have been employed at Ohio University.

____

6. Employment status.

Part-time (less than 34 hours per week, on average) -----Full-time (more than 34 hours per week, on average)

7. Gender.

Male-----Female

8. Are you a member of a Union?

Yes-----No

9. Marital Status.

Single-----Married-----Widowed-----Other

10. What is your racial or ethnic group membership?

African American-----Hispanic-----Caucasian (White)-----Asian or Pacific Islander-----Other

11. How much education have you completed?

Some High School-----High School Diploma-----Some College-----Associates Degree-----
Bachelor's Degree-----Master's Degree-----Doctoral Degree

12. What kind of pension plan do you have?

Defined Benefit (benefit based on age, years of services, and top 3 years of income)-----
Defined Contribution (benefit based on performance of investment choices made) -----
Combination of Defined Benefit and Defined Contribution-----
Not Sure

13. Please indicate the job category that most accurately reflects your current position at Ohio University.

Administration-----Accounting-----Clerical-----Record-keeping-----Grounds
Maintenance-----Food Service-----Other

14. What is your annual income from your present job?
$0 to $10,000-----$11,000 to $19,000-----$20,000 to $29,000-----$30,000 to $39,000-----$40,000 to $49,000-----$50,000 to $59,000-----$60,000 to $69,000-----$70,000 to $79,000-----$80,000 to $89,000-----$90,000 or more

SECTION J: This section contains questions that ask you to rate the extent to which you plan to search for an alternative job to your present position within the next 12 months.

1. Within this year, I intend to search for an alternative role to my present job.
Never-----Rarely-----Occasionally-----Frequently-----Very Frequently

2. What are the chances that you will search for an alternative role (another activity or job) to your present job during this year?
No Chance-----25% Chance-----50% Chance-----75% Chance-----100% Chance

SECTION K: Please indicate the amount of time that your job requires you to work in the following conditions for each day, using the following five response categories: not at all, less than 2 hours, 2 to 4 hours, 4 to 6 hours, and more than 6 hours.

1. Standing.
not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

2. Walking (to and from tasks, offices, etc.).
not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

3. Lifting objects less than 20 pounds.
not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

4. Typing and/or using a mouse.
not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

5. Speaking on the phone (with headset).
not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

6. Working in static postures.
not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

7. Working in the midst of distraction.
not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

8. Working under time pressure (administrative tasks).
not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

9. Working on tasks that are short staffed.
   not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

10. Working on a job where I have little control.
    not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

11. Working with arms above the shoulders.
    not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

12. Working with back flexed.
    not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

13. Working on a computer.
    not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

14. Prolonged sitting mainly in one posture.
    not at all-----less than 2 hours-----2 to 4 hours-----4 to 6 hours-----more than 6 hours

SECTION L: This section asks questions about your attitudes toward Ohio University. Please read the items and indicate the extent to which you agree or disagree with each statement.

1. How committed are you to Ohio University?
   Not at all-----Slightly-----Moderately-----Quite a bit-----Extremely

2. To what extent do you care about Ohio University?
   Not at all-----Slightly-----Moderately-----Quite a bit-----Extremely

3. How dedicated are you to Ohio University?
   Not at all-----Slightly-----Moderately-----Quite a bit-----Extremely

4. To what extent have you chosen to be committed to Ohio University?
   Not at all-----Slightly-----Moderately-----Quite a bit-----Extremely

5. How responsible do you feel for Ohio University?
   Not at all-----Slightly-----Moderately-----Quite a bit-----Extremely

6. Please state some reasons why you feel that phased retirement may or may not be good for you.

   ____

Click 'Save and continue later' if you would like to continue where you left off at a later time (be sure to bookmark this page or copy the URL) or 'Submit' when you are finished.