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*Engagement and Disengagement in the Retirement  
Process: an investigation of 'older' academics in  
British Universities*


Work, Age and Retirement Group

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BPS Division of Occupational Psychology Conference  
Stratford-upon-Avon, January 2011



# The retirement context


- Increased focus by governments, policy makers and organisations on older workers and retirement
- Demographics and activity rates
  - Participation rates
  - Old age dependency ratio:
    - 1960 4.1
    - 2004 3.3
    - *Mid 21<sup>st</sup> century: 2.3*
  - Pressure on pensions
  - Social justice
- Retirement is one of the issues that has been at the centre of these debates
  - Increase of the State Pension Age
  - Extending working lives policy
  - Abolition of the Default Retirement Age

# Retirement

- Banks and Smith (2006):
  - Complete or permanent withdrawal from employment
  - Being in receipt from a state or private pension
  - A state of mind : the individual perceives themselves to be retired
- “Retirement is the exit from an organisational position or career path of considerable duration, taken by an individual after middle age with the intention of reduced psychological commitment to work thereafter.” (Feldman, 1994, p287)
- Is retirement an event or a process?
- ‘Flexible retirement’



# Theories of ageing

- Disengagement theory (Cumming and Henry, 1961)
  - Activity theories
  - Continuity theories (Atchley, 1971)
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# Disengagement as a career stage and retirement

- Retirement is a withdrawal from work – either sudden or gradual. Mandatory retirement can be seen as forced disengagement.
- Much evidence of the benefits of gradual transitions to allow adjustment – flexible retirement
- However, there are concerns that the process of disengagement from work might have negative effects on attitudes and behaviours to work.
  - Easing off work
  - Developing outside interests
  - Negative attitudes / behaviours
- Pech and Slade (2006) refer to sources of disengagement older workers (not necessarily in the context of retirement) :
  - The external environment
  - Psychological factors
  - Organisational factors
  - Other factors

# Academic Staff

- 17,090 professors, 27,000 SLs, 45,325 lecturers
- Average age 47 (10% aged 60+)
- One in five aged 55+
- Complex jobs (research, teaching, administration)
- High demands, but also high autonomy



# Research focus

What are academics' opinions and experiences regarding transitions to retirement and how can disengagement theory help explain these experiences.







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# The study

- Focus on academic staff at British Universities in the North of England (4 universities)
- 15 qualitative data design based on semi-structure interviews
- Questions relate to career stage / goals, attitudes towards retirement, attitudes towards work, experience of retirement behaviours, expectations of retirement (and ageism)

# Findings

- **Ways to exit the work force:**
  - Group 1 - Not retired, working full time, but considering retirement
  - Group 2 – Not retired, but on phased retirement scheme.
  - Group 3 – Retired, but continue to work within the mainstream of the organisation, paid.
  - Group 4 – Retired, but continuing unpaid relationship with University (e.g. visiting research fellow).
- Despite arguments of transitions to retirement, respondents had clear understandings as retirement as a date upon which their contractual relationship with the institution changed.
- Few regarded their arrangements as a retirement process, rather an individualised, negotiated position.

# Meaning of disengagement

- **Disengagement as a transition in the life stage**

*“Phased retirement is a way of withdrawing the drug gently. Because I don’t know what I’ll do after I finish” . Group 2.*

*“I’d rather have a wedge thing where the amount that you are doing or having to do gradually tails off and amount you are just in cafes having cups of tea is expanding” (Group 1)*

# Renegotiation of job role

- Splitting off activities – either in terms of volume or activity
  - *“It gives me greater role clarity. I can concentrate on what I do and why I am doing it.”*
  - *“I can concentrate on the bits of the job that I like best; i.e. teaching. Less administration, course reports and stuff like that. So why bust a gut when you don’t need to. Far better to get out on a high.*
  - *“I have used it to declutter”*
  - *But as for retirement from chasing somebody else’s KPIs, maybe I shall be really brassed off in a couple of years time to do that.*
  - *“Flexible retirement means doing less of the admin”*
- This latter aspect points to the notion that the renegotiation of the contract can be highly positive for individuals

# Renegotiation of job role

- **Greater control**

- I remember the day I actually retire, it was my birthday, and my daughter said, “You’ll never need to go in again if you don’t want to”. I thought, “No. I don’t. But I do want to go in. It’s my choice’. So really it was quite nice. It was a new beginning, you could say.
- “I take it as a year at time. So I’m, I’ve indicated to [my Head of Department] that I am 90% certain that I will sign on for another voyage. A year is a voyage. Next year. I’ll make that decision round about June and once we’ve had our appraisal, I’ll make my decision. I will decide.

- **Shift to a more transactional psychological contract**

# Continuity

- Value of work itself
  - “In retirement in general, I want remain useful. One way of remaining useful would be in part time or ‘visiting role’.” Group 1.
  - “In work I have status” (Group 1)
- Social relationships (students, colleagues)
  - *It is a nice balance of continuity of the research and the intellectual activity and the companionship of people here as well. lance of continuity of the research and the intellectual activity and the companionship of people here as well.*
  - *They [colleagues] won't find me boring. A certain class of person will just say .. "oh he's just going on and on boring old sod". But actually, in the University, we're not boring old sods, but we are thinking about things that other people may find boring*
- Insider status /membership (and fear of not having it)
  - *People who have worked here for years and who have left. They've come back as part timers and they seem to be very marginalised.*

# Negative aspects of behavioural disengagement

- Fears of colleagues' perceptions

“I think the obstacles are the attitude of the people who are still the full-time employees.

And the extent to which they feel that somebody that is on a flexible fractional contract may or may not be making the appropriate contribution.” Group 1.

“Your colleagues might think you are winding down. That you are not fully paid up” Group 1.



- Work full time, paid for part time

- Staff with senior management roles were doubtful that they

- a) could undertake that role on a less than full time basis and

- b) would not like to take on a less senior role.



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- Disengagement through development of external activities
    - Professional memberships
    - Continued research
    - External leisure activities
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# Attitudinal disengagement?

- Perception of being at peak of career
  - I would say I'm at the peak (of my career). I would hope it's not the peak in the future, I hope I'm still heading towards it. But based on where I am now, I don't think I've felt happier in terms of job satisfaction in terms of the opportunities I get within education generally to do things that I can contribute towards and also things that I benefit from. I've never felt particularly bad. I don't want to be misunderstood. It's just the best of a good period. (Group 1).
- Active in research projects, PhD supervision, publications etc, both before and after 'retirement'
- For some in Group 4, retirement had freed her to commit to her intellectual work.
- Plans for future research work (books etc)

# Attitudinal disengagement?

- Commitment to the institution
  - A number of employees on the verge of retirement spoke of their efforts to keep operations going, despite HR
  - Institution is able to provide facilities and status
  - However, for those in Group 4, the commitment was based on practical reasons, rather than strong identification with the institution.
  - For a number of academics, there was decreased commitment to the organisation due to changes (negatively perceived) in recent years.
- Commitment to outside professional activities
  - “Professional people shouldn’t stop being professional people. It’s a life time thing.”
  - Membership of professional societies, external examining, editorship of journals etc

# Discussion

- Some evidence of behavioural / social aspects of disengagement, but this is can generally be characterised as positive / functional adjustment
- Little evidence of psychological disengagement in areas of personal work interest, but some in other areas.
- What is 'work' for academics?
- The findings of the study may be particular to the occupational groups (academics)
- This analysis does not focus on 'societal expectations' of older academics
- Limitations: small sample size to date,