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The Influence of Bridge Employment on Roles and Routines in Older Adults

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By

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Abstract

This qualitative study examined the influence of bridge employment on roles and routines in older adults. The participants included seven older adults, age 55 and above, who had retired from their primary employment and were working in a post-retirement bridge occupation. Participants completed the Occupational Questionnaire which contributed to the development of focus group questions to further discover the experiences of older adult retirees. Participants discussed topics related to their roles and routines as impacted by engagement in bridge employment. Thematic analysis was completed revealing three themes of managing time, exploring options, and planning finances. Member checking and the use of an outside coding expert ensured trustworthiness. Researchers found that the schedules of these older adults were influenced by individual personality and a desire to have less responsibility. Participants expressed interest in making a difference in the world, giving back to the community, remaining active, and using finances for memorable time with family. A limitation of the study was lack of racial and socioeconomic diversity. Findings are relevant for occupational therapy practitioners working with older adults who are transitioning to full retirement.

The Influence of Bridge Employment on Roles and Routines in Older Adults

Older adults are continuing to work past the age of retirement. The changing demographics within the United States and the developed world offer a choice between full retirement and the possibility of bridge employment. Bridge employment is a term for part-time or casual work after retirement (Griffin & Hesketh, 2008). Retiring older adults have the option of full retirement, bridge employment in their own career field or in a different field of work, or beginning volunteer work (Ulrich & Brott, 2005). The retirement transition can be complex, but people who avail themselves of bridge employment have improved health, sense of self, participation in social activity, and marital satisfaction (Wells, de Vaus, Kendig, & Quine, 2009). The following research question guided the exploration of bridge employment in this study: how does bridge employment influence the roles and routines in older adults?

This qualitative study examined how bridge employment influenced the roles and routines of older adults. An examination of the literature included a variety of topics related to the retirement transition and bridge employment, such as choices, concerns, and effects on roles and routines. Pinquart and Schindler (2007) recommend determining which roles were active before and after the retirement transition in order to identify what roles continue to be important in daily life. By integrating bridge employment into their lives, retirees may be able to maintain their role identity as they transition from a previous job (Zhan, Wang, Liu, & Schultz, 2009). The amount of satisfaction an individual has with work before retirement can have an effect on their desire to participate in bridge employment, and whether or not their bridge job is similar to their pre-retirement career (Gobeski & Beehr, 2009). Although the number of older adults participating in bridge employment is increasing as Baby Boomers are approaching retirement age, there is limited research on the effects of bridge employment on roles and routines. The

purpose of this study was to examine how the retirement transition and bridge employment influenced the roles and routines of older adults.

Literature Review

Bridge employment can be categorized into two primary types: career bridge employment and bridge employment in a different field (non-career bridge employment) (Gobeski & Beehr, 2009) and can also include volunteer work. There are a variety of reasons why a person would choose to stay in their career field versus the alternative. Career attachment is “the desire to remain active in the same career and have a positive effect related to employment in that specific career” (Gobeski & Beehr, 2009). Those who have experienced career attachment or who have enjoyed considerable job satisfaction in their career field tend to stay in the same type of work, but those who did not enjoy their pre-retirement work will likely choose another form of employment (Gobeski & Beehr, 2009). Individuals with a higher income prior to retirement are less likely to fill their time with paid work (Griffin & Hesketh, 2008), choosing to work in volunteer positions.

Dendinger, Adams, and Jacobson (2016) further explored Mor-Barak’s (1995) four reasons for participation in bridge employment—job satisfaction, retirement attitude, and occupational self-efficacy. Mor-Barak’s research led to a theory of four main factors that give meaning to work for older adults, which included social, personal, financial, and generative subjects (Dendinger, Adams & Jacobson, 2016). Generativity, a concern and commitment towards future generations by passing on skills and abilities, was identified as a reason behind bridge employment (Dendinger, Adams & Jacobson, 2016). Dendinger, Adams and Jacobson (2016) concluded that the generative reason for work served as a reliable predictor of job satisfaction and attitudes toward retirement. In a study by Loi and Schultz (2007), similar results on generativity were confirmed. Older adult workers were categorized into four subgroups:

midlifers, displaced workers, retirees, and older retirees. Of these groups, they found that retirees and older retirees were guided by generativity, and were not compelled to choose bridge employment because of benefits or financial needs (Loi & Schultz, 2007).

Pinquart & Schindler (2007) examined the satisfaction of the retirement transition through a comparison approach of various sub-groups within a population. These researchers concluded, “that retirement is not a uniform transition. Different trajectories of life satisfaction can be observed depending on external circumstances of retirement (e.g., transition from unemployment or from employment) and on available individual resources (e.g. SES, being married, physical health)” (Pinquart & Schindler, 2007, p. 453). Ulrich and Brott (2005) explored transition issues, experiences, and decision-making processes of older workers who selected bridge employment. Researchers found that three factors led to participants feeling successful in their jobs: to keep learning, to make a difference with others around them, and to prove that they are competent (Ulrich & Brott, 2005).

For the purposes of this study, roles were defined using the Occupational Therapy Practice Framework as “sets of behaviors expected by society and shaped by culture and shaped by culture and context” (AOTA, 2014, S8). Retirement allows for more free time for retirees to participate in roles of their choosing (Wang, 2007). Yet, as adults approach retirement, they are likely to experience role loss (Cozijnsen, Steven, & van Tilburg, 2010). Those who are retired will have less diversity within their roles, as the roles that they are able to participate in become more limited (Cozijnsen, Steven & van Tilburg, 2010). Individuals can prepare for this change by gradually developing new roles or strengthening their existing roles (Noone, Stephens & Alpass, 2010). Due to the trend of older adults desiring a more active life after retirement, there is a greater focus on role change (Schnittker, 2007). Olesen and Berry (2011) found that one way an individual could begin to increase their roles is by participating in

their community. The found that the desire for increased community participation was a strong influencing factor for numerous retirees (Olesen & Berry, 2011).

When roles change, the relationships with family, friends, and colleagues may change as well (Cozijnsen, Steven, & van Tilburg, 2010). Social roles are likely to change during the time of retirement, along with work roles (Schnittker, 2007). However, social relationships formed within the work role need to be maintained outside of the workplace prior to retirement (Cozijnsen, Steven & van Tilburg, 2010). Developing relationships outside of work gives those who retire the ability to maintain stronger social connections throughout their retirement transition (Cozijnsen, Steven & van Tilburg, 2010).

Gender also can have an effect on role change in the retirement transition. Women are more likely to have roles that involve caring for and nurturing others, which creates an easier role transition as they rely on existing roles (Diekman & Goodfriend, 2006). Family obligations and commitment to familial roles stereotypically fall to women and they are able to maintain these roles throughout the course of their life (Byles, et al., 2013). Consistency of familial roles throughout the lifespan for women creates a more stable and positively viewed role and retirement transition (Diekman & Goodfriend, 2006). Since women have more lifestyle stability in this time, they are also thought to have better role transformation, as they are better able to embrace and fully commit to roles that previously played a smaller part in their lives, versus males who have to typically discover new roles (Byles, et al., 2013).

For the purposes of this study, routines were defined as “established sequences of occupations or activities that provide structure for daily life; routines also can promote or damage health” (AOTA, 2014, p. S8). Segal (2004) performed a qualitative study on routines or rituals in families. He theorized that by adding occupations or activities into a routine, or

adapting the way routines are performed, significant adaptations in life can be easier to implement.

Methods

The research question was: how does bridge employment influence the roles and routines in older adults? To address this question, qualitative design was used to examine the narratives of older adults who engage in bridge employment to determine the roles and routines that were important to their individual lifestyles. This study used the Occupational Questionnaire (Smith, Kielhofner & Watts, 1986) and a focus group to discover the experiences of older adults who have engaged in bridge employment. All portions of the project were approved by the Institutional Review Board and were conducted at the University of Indianapolis.

Participants

This research study included seven participants from the Indianapolis area. Shtivelband (2013) determined that the age to be considered an older adult began at 55 years old. Therefore, the inclusion criteria were adults, aged 55 and older, who had retired from career employment and now participated in bridge employment or volunteer work on a regular basis. Family members of researchers were excluded from participation this study.

Procedures and Materials

The participants, aged 55 and above, were recruited through the use of personal contacts and a recruitment flyer, which was posted at community centers and other organizations where older adults may engage in vocational, leisure, or social activities. Following initial phone or email contact, prospective participants offered their availability. Once seven participants were identified, researchers scheduled a date for the focus group that was convenient to all participants. Upon arrival to the University of Indianapolis, participants completed the informed consent process, and selected pseudonyms for use throughout the session. Researchers then

individually administered the Occupational Questionnaire with each participant. This tool was used to learn about the unique variations in routines with comparison of a typical bridge employment workday to a typical non-work day, and the value that participants placed on these daily activities. Each participant ranked time spent by labeling activities into the following categories: work, daily living tasks, recreation, or rest, with ratings in performance, importance, and enjoyment (Smith, Kielhofner & Watts, 1986). The Occupational Questionnaire was selected for its reliability and validity (Smith, Kielhofner, & Watts, 1986) and for its focus in occupation-based language as a Model of Human Occupation (MOHO) tool (Keilhofner, 2008). The time required to administer the Occupational Questionnaire was approximately twenty minutes, which was consistent with previous use of this tool (Kielhofner, 2008). After doing so, the Occupational Questionnaires were reviewed and used to generate additional topics for conversation during the focus group.

Following the Occupational Questionnaire, the participants gathered for a focus group. Utilizing the guidelines identified by Kruger and Casey (2015), the focus group included seven participants and lasted approximately one hour. The leaders of the focus group prompted participants using semi-structured questions, which were tied to participant value statements regarding their bridge employment and daily routine (see Appendix). Following the focus group, participants were individually debriefed, allowing the opportunity to address any remaining topics that might have contained sensitive information or were not addressed directly during the session. Their participation in the data collection lasted approximately two hours. Member checking (Creswell, 2013) occurred after initial data analysis, two weeks following the focus group, via telephone.

Data Collection

The focus group discussion was audio recorded and two researchers were assigned to record field notes. Audio recordings were transferred to a password-protected computer and stored behind a locked office door at the University of Indianapolis. Transcription of the focus group discussion occurred within 72 hours of the event using Microsoft Word. Field notes provided context and were incorporated into the transcription documents using the comments feature within Microsoft Word.

Data Analysis

Thematic analysis (Braun & Clark, 2006) occurred after transcription was completed. Memos provided context to the initial codes to further develop meaning. Codes were compared across research team pairings and verified by an outside content expert. A matrix was used to categorize frequently occurring codes from participant statements and helped organize these narratives into themes. An audit trail was maintained to enhance trustworthiness. To further insure trustworthiness, each member of the research team completed a reflexivity journal (Creswell, 2013) immediately following the focus group. Data analysis included an examination of reflexivity journal entries to expose researcher bias.

Findings

Researchers identified three themes regarding the effect of bridge employment on roles and routines of participants: managing time, exploring options, and planning finances.

Managing Time

There were two sub-themes discussed throughout the focus group for older adult retirees participating in bridge employment including evening consistency and daytime freedom. A contrast to the pre-retirement routine of daytime consistency and evening freedom. The participants indicated consistent evening routines for both workdays and non-workdays.

Participant A. (retired Air Force officer and special education teacher) offered, “Even when I was working and now that I’m retired, there’s a certain hour of the day that everything kind of falls back where it always was”. Participant K. (retired law enforcement officer) also supported this theme when stating, “But my evening routine is very, very standard”. Participants, noting that bedtime routines were consistent for workday versus non-workday, also supported this theme of a consistent evening routine during administration of the Occupational Questionnaire. Participant B. (retired from a telephone company and national sorority) also commented, “I was very schedule oriented and I think in retirement I’m very schedule oriented”. Although their daily routine varied greatly, their evening routine did not seem to change, and each individual expressed that they enjoyed new control over daily schedules. Participant A. gave an example of this, saying, “The days when I don’t have that early class, I get up and I *might* get dressed”.

Although their schedules varied from day to day, the participants were often engaged in meaningful activities that brought fulfillment. “I wanted to be in control and do things that I wanted to do and things for me in a selfish way” (Participant G., retired elementary teacher). Participant L. (registered nurse) gave an example by stating, “We want to be involved with something where we are making a difference, where we are making some kind of impact on whatever that may be”. On the other hand, Participant K. (police officer) disagreed by saying, “I don’t want to make an impact, I’ve done that all my life. Not with my career. I want to do something that is a little bit more fun and relaxed and not so stressful”.

Participants reported satisfaction in controlling of their work and activity routine. A consistent theme of the discussion was the ability to independently manage their schedule. As Participant G. said, “I told myself when I retired that I was *not* going to not do things, cause that was not my, that’s not my make-up. And I am so excited to be able to now drive my own

calendar”. Participant L. also supported the notion of managing time, when he asked another participant, “Having control of your own schedule is just so huge for you isn’t it?”

Participants agreed that they preferred staying busy with family and friends rather than relaxing all day. Many expressed their thoughts and feelings on keeping busy because they wanted to make a difference in the world, give back to their community, and continue to be active. “We want to feel like we are engaged in making a difference with something” (Participant L). The desire to stay busy as influenced by personal interests, without having many real-time commitments, allowed participants to fill their days with new activities.

Exploring Options

Throughout the retirement transition, older adults who participated in bridge employment often explored their options in reflection of the desire to have both responsibility and the ability to try new things. Personality impacted individual preferences toward retirement options. In this study, older adults had personal motivation to participate in bridge employment, which included various occupational desires such as volunteer work, part-time work, family time, or other hobbies. This motivation was reflective of the volition described in the Model of Human Occupation that helps to secure one’s occupational identity (Keilhofner, 2008). There was a notable difference between the individuals who feared commitment and those who desired to explore new options. One way of identifying these differences was via the results of the Occupational Questionnaire, which revealed the differences in scheduling for a workday versus non-work day. Those who expressed they enjoyed exploration had more free time on their non-work days for new activities, such as different exercise classes, social groups and more. Participant K. stated, “I have the option of not working quite so hard or stressfully”. Individuals who showed more tendencies to avoid commitment had less free time within their schedules and did not allow much time to explore options. These aspects also related to the level of

responsibility individuals wished to maintain through their retirement. Those who have more responsibility in their life did not have as much time to explore options. They felt a commitment to the things they were already doing in their life and had no desire to change them.

Participants frequently expressed a preference to do only the things that they chose, and not necessarily the things that were required of them. This gave them less responsibility, and more flexibility when pursuing their options. Participant L. said, “I have the option to say yes or no to it”. This flexibility can again be seen through the responses on the Occupational Questionnaire, as those who wanted more flexibility had more open time in their schedule, where others had more predetermined schedules with less flexibility. The participants were able to define themselves in new ways by exploring their options. Participant L. stated, “We have just a bazillion options of what we want to do with our time now”. Participants used these options to develop themselves as individuals during their retirement. The definition of their new self had a tendency to also have meaning or be impactful in reflection of their increasing desire give back as they experienced retirement. This gave them the ability to focus on their new areas of interests throughout their retirement with intentional use of their time. Participant A. described this by saying, “You go where your passion leads you, but if you don’t like it, it isn’t a 30-year commitment”. Although passions were a driving focus, individuals were also able to explore opportunities that were not previously possible due to finances.

Planning Finances

Finances were a recurring topic of focus group discussion. Participant K., while referencing his financial planning both before and after retirement, stated, “Everybody’s situation’s a little different”. Participants nodded in agreement with this statement; however, they also recognized similarities in financial planning amongst group members. The group discussed that, unlike previous generations that saved their money for their family to inherit, they

preferred to use their money while they were still alive and enjoy it with their family. Participant A. referenced a conversation she had with one of her daughters about leaving money to her. She offered her daughter's comments stating, "'We want to enjoy this with you. So get your butt out and go.' And so we do, we make trips together".

Participants also explained that they pay more attention to the stock market now that they have retired. Participant B. supported this when stating, "I worry about the stock market more", with many of the members nodding in agreement. Participant A. stated, "I kind of plan things out knowing my set income". During a discussion of financial planning before retirement, Participant K. offered, "I stressed throughout the years to get that stuff". Group members agreed that planning prior to retirement relieved stress post-retirement.

Discussion

Participants in this focus group revealed how individuals who retire, then return to bridge employment or participate in a volunteer opportunity are active in managing their schedules, exploring new opportunities, and anticipating how to spend their earnings. Findings in this study mirrored a research article that used the Model of Human Occupation (MOHO) to assess elderly retirees. Tincher (1992) found that older adults' choices for occupations after retirement are of their own volition, and this choice influenced their performance and designated roles that came to structure their routine. Each participant in this study expressed their volition through their exploration of a variety of different types of bridge employment.

Volition was seen in this study through the participants' emphasis on controlling their own schedule. Several participants reflected on their motivation for retirement, such as participant G. who said the following:

I mean for once you sort of feel like hey I'm in control. I mean which is what I wanted to be. I wanted to be in control and do things that I wanted to do and things for me in a selfish way.

Although some aspects of participants' daily lives varied, evening routines remained consistent. Participants suggested that they valued their evening routine. Participant A. said, "You just don't think about it, it's such a habit. You're right. Even when I was working and now that I'm retired there's a certain hour of the day that everything kinda falls back where it always was". Consistent routines enhance occupational participation by offering a daily time of relaxation for participants in this study. This was supported by a study completed by Jonsson, Borell & Sadlo, who also found that older adult retirees spent their weekday evenings "in 'rest', described as reading and watching television" (2000, p. 31). This study also indicated that routines in older adult retirees evolved into a "slower rhythm" (2000, p. 31) after retirement.

Participants demonstrated performance capacity through the use of bridge employment as a tool to enhance opportunities. For these participants, a pre-planned retirement income allowed the financial freedom to control their schedules and broaden their interests. Engagement in bridge employment provided fulfillment through expansion of one's social circle, increased community involvement, and improved sense of self-worth. "We want to feel like we are engaged in making a difference with something" (Participant L). This sense of importance drove many participants to maximal performance capacity within their bridge employment or volunteer work. Sewdas et al., (2017) confirmed these findings in a study where post-retirement work was identified as giving a practical meaning to life to older adult retirees.

Managing Time

When examining the management of time, there was consistency in participants preferring to have control of their own schedule. One participant indicated that gaining control

of time and schedule was the primary benefit of retirement. Participant L. stated “We get to choose how we spend our time now”. One participant noted that she enjoyed being able to build her own schedule by choosing what she participates in on a daily basis. Other participants agreed on the value of having the ability to plan days around personal schedules and make modifications as necessary. Many participants emphasized the importance of evening consistency and daytime freedom. Participant K. said the following:

My evening routine is similar every day. Whether I’m working it’s a workday or recreation day or whatever. That’s you know the eight-ish, eight or nine o’clock in the evening, you know done with dinner, wind down, relax, ten o’clock news then off to bed. That, you could almost set a clock by that I guess.

Many participants agreed that they had the same evening routine, which included winding down around the same time every night. This is supported by previous research, which found that individuals prefer to have control of their own schedules in order to give themselves more feelings of confidence, and cultivate more purposeful time spent (Lim & Feldman, 2003). Dingemans (2014) also found that individuals choose to partake in bridge employment based upon the schedule flexibility of the employer, furthermore, suggesting that these individuals value the self-determination of their own schedule.

In addition to determining their own schedule, spending time with family and friends as desired was important to participants in this study. Participants discussed their new freedom of using weekdays for socialization. One participant stated, “Generally, a lot of my friends say ‘lets not do it on the weekend when everybody else is at the show or at the restaurant, let’s just,’ you, you can go during the week, the prime time” (Participant A.). Kojola & Moen (2015) found similar results indicating individuals in retirement still have a tendency to plan based on their personal wants and needs, or the wants and needs of their family. Participants in this study

placed high value on the control of time in retirement, and this included the daily freedom to participate in hobbies or other activities of their own choice.

Exploring Options

Retirement can offer an opportunity for older adults to participate in roles they did not previously have time for by allowing them to do more of what they choose (Wang, 2007).

Participants in this study expressed that they enjoyed having the chance to explore new activities

Participant K. offered, “I want to do something that is a little bit more fun and relaxed”.

Previous researchers confirm these experiences, reporting that retirees who carry more positive attitudes or express that they enjoy retirement are more motivated and interested in making plans during their retirement (Lim & Feldman, 2003). Participant A stated “I just think that retirement is great”, reflecting her positive attitude, and verifying Lim and Feldman’s results as she went on to express her desire to make new plans in her retirement. Participant A. continued on and stated, “when I retired I thought, there is a lot of things out there and I’m not done learning yet”.

Retirees may be involved in many other roles through bridge employment, volunteer work, or even caregiving within their family. Olsen and Berry (2011) found that participating in community activities is a way for individuals to expand their roles. The findings of this study support Olsen and Berry’s work shown by participants’ suggestions that bridge employment allows them to give back to the community. This community participation was revealed in previous research as supportive of a higher quality of life in older adults (Merrian & Kee, 2014).

Planning Finances

Participants in this study indicated that earnings were often valued as a provision for their families, for both the present and the future. Participants expressed they would rather spend money on experiences with family now, rather than save to pass on to their family. In reference to using money for family memories, Participant A. offered the phrase shared with her children,

“I want to see the expression on your face when you use my money.” This is supported by a previous research study by Kojola and Moen, (2015) who also discovered that individuals who have entered retirement are more likely to plan and consider their families when preparing for the future. Participants also reported that they spent more time attending to the stock market. This was supported by another study by Lusardi and Mitchell (2006) who found that current older adult generations are more exposed to the stock market than cohorts younger than them.

Participants reported that they were active in financial planning for retirement. Results of a study by Schooley & Worden (2013) support this idea of planning prior to retirement in order to have reliable savings during retirement. The researchers explained how individuals become savers during later stages of life and then convert these savings to use during retirement (Schooley & Worden, 2013).

Limitations

A limitation of the study was that participants had been retired from their career job for a varying number of years. Time retired, along with the age of the participant, may have affected the results in that more life experiences had occurred with increased time since retirement. Making some participants more ‘savvy’ retirees. Another limitation was that the limited diversity in the focus group might prevent the results from being applicable to individuals who have different financial resources or live in different areas. This was evident in the discussion regarding preparation for retirement. Individuals from a variety of socioeconomic backgrounds may be more or less likely to connect their enjoyment of retirement to financial planning.

Recommendations

Future studies may consider what led individuals to pursue bridge employment or how demographic characteristics influence selecting bridge employment in retirement. Another area that may benefit from further study is how relationships change between spouses, families, and

friends during bridge employment or retirement alone, and how these relationships are influencing the transition.

These findings are relevant for occupational therapy practitioners who work with older adults during the retirement transition. The occupational therapy scope of practice includes identifying and assisting individuals with their daily roles and routines (AOTA, 2014, p. S35). Older adults who are engaged in bridge employment have evolving roles and routines. Occupational therapy practitioners can use the findings in this study to support the occupational performance of their clients and assist them with the challenges of the retirement transition.

Conclusion

This study examined how bridge employment during the retirement transition influenced the roles and routines of older adults. Consistent themes from focus group participants were managing time, exploring options and planning finances. Findings included that schedules of older adult retirees were often influenced by individual personality and the desire to have less responsibility. Regardless of personalities, older adult retirees who participated in bridge employment valued evening consistency and daytime freedom. Participants expressed continued interests in making a difference in the world, giving back to the community, remaining active, and using finances for memorable time with family during retirement. Occupational therapists are uniquely positioned to help older adults develop roles and routines to improve the transition process of older adult retirees as they engage in bridge employment.

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Appendix

1. Please state your career job, retirement date, and current bridge employment or volunteer position.
2. What things in your routine on a workday carry over on a non-work day? What are the main differences in your routine on workdays versus non-work days?
3. Tell us how your roles have changed since retiring and beginning bridge employment.
4. Tell us about any hobbies that you have picked up since you have entered your bridge job.
How have your responsibilities in the home changed?
5. How does your hygiene/self-preparation routine change on the days that you work?
6. Since you began bridge employment, has your diet changed? Would you say it is consistent throughout the week or does it change based on the day you work?
7. How has your health been affected since beginning bridge employment? Do you think your health is better than your parents at the same age? Did your parents participate in bridge employment?
8. How do you find yourself socializing or participating in community outings differently compared to your lifestyle prior to retirement? Is there opportunity to socialize with friends or family during the day, that you used to only do in the evenings or on the weekends?
9. How is your concern for finances different from when you were employed in your career job? Do you find yourself less worried or more? How have you had to manage finances differently?
10. Do you find your sleep is more consistent/less consistent? Do you find you need more or less sleep, why?