

THESIS

WORK AND RETIREMENT FACTORS RELATED TO THE TIMING OF RETIREMENT

NOTICE

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## ABSTRACT

The aging workforce has made retirements increasingly common in organizations. However, research is scant on how retiring employees separate from their organization. That is, what occurs after employees have made the decision to retire but before they leave their jobs. One important issue centers around the timing of retirement notice, which is important if organizations are to predict and plan for the departure of their older workforce. In this study, I used extant research and theory on the employee-organization relationship and the push-pull model of retirement to argue that the quality of employee-organization relationships, at the organization and supervisor level, and the conditions under which people retired relate to the timing of retirement notice. To test the hypotheses, I sampled 105 individuals who retired within the last two years or planned to retire within the next year. Results showed that perceived organizational support was positively related to retirement notice, whereas push reasons for retirement (i.e., retiring under negative conditions) were negatively related to retirement notice. I did not find a significant relationship between retirement notice and leader-member exchange or pull reasons for retirement (i.e., retiring under positive conditions). Results are discussed in relation to previous research and theory on employee resignation, retirement, and employee-organization relations as well as future research and practical implications.

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## INTRODUCTION

The workforce is aging and the proportion of older workers continues to increase. By 2020, workers age 55 and older will account for 25% of the American working population (Hayutin, Beals, & Borges, 2013). There have also been marked changes in retirement patterns. Today, retirement is considered a highly heterogeneous process, with great variability in when workers decide to retire and the degree of continued labor force participation in retirement (Cahill, Giandrea, & Quinn, 2015; Fisher, Chaffee, & Sonnega, 2016). Workforce age demographics and retirement trends of the 21<sup>st</sup> century have led to increased research focused on older workers and retirement issues. Although much is known about the retirement decision making process (Feldman & Beehr, 2011; Jex & Grosh, 2013), including predictors of retirement timing and form (Cahill et al., 2015; Fisher et al., 2016; Topa, Moriano, Depolo, Alcover, & Morales, 2009), research is scant on how workers actually separate from their organization. That is, after the decision is made to retire, how does a worker navigate the process of planning for their role exit (including deciding when and how to notify others at work of their intentions to retire), carry out their resignation plan, and then finish up their work in an organization that knows of their imminent departure? I refer to this final act of organizational separation prior to retirement as the retirement resignation process.

The aging workforce has made retirement an inevitable issue for many organizations (Wang & Zhan, 2012). Consequently, the retirement resignation process has important implications in today's work environment. One important issue centers around the timing of retirement notice. Specifically, the amount of advanced warning organizations are provided regarding an employee's departure for retirement. Retirement notice refers to the length of time that elapses from when an employee resigns (i.e., formal notice given to employer regarding

one's decision to leave) to his or her final day on the job. Historically, there was little need for organizations to consider when their employees would retire because people retired in relatively predictable ways (at the end of a long career, usually the age at which they became eligible for a defined benefit pension or Social Security retirement benefits). Today, however, heterogeneity in the timing of retirement has made it increasingly difficult for organizations to predict and plan for the departure of their older workforce (Davidson, Lepeak, & Newman, 2007).

Knowing when retiring workers plan to leave is critical for an organization's succession planning efforts and human capital strategy (Davidson et al., 2007; Wang & Zhan, 2012; Wang & Shultz, 2010). Compared to general employee turnover, retirement departures pose a unique and possibly more consequential challenge for human resource management (HRM) because retiring workers tend to have longer tenure within an organization, greater organizational and job knowledge, and tend to hold leadership positions (Davidson et al., 2007). Limited communication between retiring employees and their employers can negatively affect organizational functioning in a variety of ways. For example, if an employee retires unexpectedly, organizations may not have enough time to find and/or adequately train a replacement. If the retiring worker is a longtime employee, his or her exit may result in a loss of valuable job and organizational knowledge (Burmeister & Deller, 2016). Further, the length of resignation notice provided by a retiring employee may have longstanding effects by setting a precedence for other retiring workers about how to handle their retirement exit.

The purpose of this study is to enhance our understanding of the retirement resignation process by identifying factors that may influence the timing of retirement notice. By conducting the first investigation of retirement resignation, this study serves to contribute to our theoretical understanding of the retirement process, including how retirement information is communicated

in the workplace. Pragmatically, the knowledge gained from this study may help organizations develop strategies to promote open communication about individuals' retirement plans, and thereby provide organizations a way to better predict and plan for the departure of their older workforce. Ultimately, this line of research into retirement resignation may help facilitate more constructive retirement conversations at work, which is key to helping older workers and employers negotiate retirement transitions that optimally benefit both parties.

This paper is organized as follows: First, I define retirement and discuss retirement as a form of voluntary turnover. Second, I review prior research about employee resignation. Third, I discuss the theories used to guide this study and present hypotheses and research questions related to the work and retirement factors that influence the timing of retirement notice.

### **Defining Retirement**

Retirement is not a single event, but a complex, multilevel phenomenon that unfolds over time (Shultz & Wang, 2011; Szinovacz, 2013). The focus of this study is on retirement behavior as a dynamic process that unfolds in the workplace between a worker and the organization. This is consistent with the person-organization perspective, which suggests retirement can be conceptualized as a decision-making process (individual-focused) and as a part of HRM (organization-focused; Shultz & Wang, 2011). From an individual perspective, retirement is defined as the process of workforce exit, characterized by a motivated decrease in psychological commitment to and behavioral withdrawal from work (Feldman, 1994). Retirement is hypothesized to unfold through a series of employee-driven decisions such that workers make decisions about retirement and continued work based on rational evaluations of available information concerning their current and anticipated life situations (Wang & Shi, 2014).



From an organization's standpoint, retirement can be conceptualized as a form of turnover such that employees who are often in senior-level positions and/or have greater organizational tenure leave the organization through gradual transition or an abrupt exit (Bennett, 2010). Because retirements can benefit or hinder organizational functioning, retirement is considered a process that can be managed through human resource practices such that retirements can be coordinated in a way that facilitates the achievement of strategic goals (Wang & Shultz, 2010; Wang & Zhan, 2012). That is, organizations often incorporate retirement-related practices into their human capital strategy to maintain high-levels of organizational functioning (Wang & Shultz, 2010). These practices can shape retirement behavior and decisions in terms of the work and retirement options that are available for older workers (e.g., phased retirement, early retirement incentives, flexible work arrangements), but also through perceptions of an organization's support for and investment in older workers (Wang & Zhan, 2012).

It is advantageous to conceptualize retirement from a person-organization perspective when examining the factors that influence the length of notice retiring workers provide their employers. Researchers typically rely on the informed decision making approach when investigating predictors of workers' retirement decisions, including when people decide to retire and how they exit the workforce (e.g., bridge employment, full retirement; Wang & Shultz, 2010; Wang & Shi, 2014). It is fitting then to apply the same approach to investigate the antecedents of retirement decisions as they relate to how much retirement notice departing employees decide to give their employer. Further, because research shows that organizational factors influence retirement decisions and behaviors (e.g., HRM practices and policies, work relationships, age discrimination; Fisher et al., 2016; Oakman & Wells, 2015), it is likely that retirement decisions related to the resignation process are also influenced by workplace factors.

## **Retirement as a Form of Turnover**

The concept of retirement resignation is at the intersection of the retirement and voluntary turnover literatures; therefore, it is important to delineate both types of organizational withdrawal. Both retirement and voluntary turnover are forms of employee departure that are highly contextualized and generally unfold over time (Feldman, 1994; Hanisch & Hulin, 1990). Prior research supports retirement and voluntary turnover as conceptually and empirically distinct constructs as evidenced by marked differences between predictors of retirement and turnover intentions (Adams & Beehr, 1998; Schmidt & Lee, 2008). However, the abolishment of mandatory retirement (for most jobs in the U.S.), the increase in defined-contribution plans (retirement income is now less contingent on age and/or organizational tenure), and the proliferation of bridge employment has made retirement in the 21<sup>st</sup> century, in many ways, quite similar to voluntary turnover (Hom, 2011; Hom, Mitchell, Lee, & Griffeth, 2012; Newman, Jeon, & Hulin, 2013). That is, compared to previous generations, today's older workers can *theoretically* work as long as they desire and can retire according to their own timetable.

Traditionally, turnover literature has not recognized retirement as a form of *voluntary* turnover. Instead, retirements, along with dismissals, layoffs, disabilities, and death have been treated as involuntary exits. Accordingly, few studies have investigated retirement within a turnover framework (a notable exception is Bennett's (2010) use of Lee and Mitchell's (1994) unfolding model of voluntary retirement), which has contributed to a distinct separation of turnover and retirement literatures. Recent theoretical advancements, however, have expanded the criterion domain to include multiple types of turnover (including “involuntary” quits, e.g., retirement) and turnover destinations (i.e., where people go after they leave, e.g., bridge employment, full retirement; Hom et al., 2012). Thus, it is expected that empirical research will

soon emerge to bridge the turnover-retirement gap in the near future. This study is one step in that direction.

Taken together, the conceptual boundaries that differentiate retirement from employee turnover are more ambiguous today compared to previous generations. Further, the impending retirement of the baby boom generation coupled with theoretical advancements in turnover literature have led turnover scholars to advocate for the extension of their models to elucidate retirement decisions (Hom, 2011). To this end, the application of turnover models to explicate retirement decisions as they relate to the resignation process is ripe for investigation. It is fitting then to conceptualize retirement as a form of employee turnover when investigating the timing of retirement resignation because the resignation process underlies most forms of voluntary organizational exit.

### **Employee Resignation: A Neglected Area of Research**

Regardless of why people leave their jobs or where they go after they leave, most organizational exits are preceded by some form of a resignation process. That is, most employees make decisions about how they are going to leave their jobs and engage in behaviors to separate themselves from their employer (Klotz & Zimmerman, 2015). Although implicit in the process of voluntary turnover, until very recently conceptual and empirical research directly addressing employee resignation was virtually nonexistent.

Recently, however, Klotz and Zimmerman (2015) proposed a conceptual model of the resignation process based on employee socialization theory (Feldman, 1981; Jablin, 2001). The process of employee resignation is thought to parallel organizational entry such that individuals move from organizational outsiders to insiders (through different phases of socialization) and then pass back through the boundaries of the organization to become outsiders once again

(Feldman, 1981; Klotz & Zimmerman, 2015; Van Maanen, 1975). Similar to the process of employee socialization (Feldman, 1981; Jablin, 2001), employee resignation is hypothesized to occur in three stages: formulation, announcement, and the notice stage. The formulation stage begins once employees decide to leave their jobs. During this time, employees determine how they are going to leave (e.g., when to notify others of their decision to exit) and prepare for life after departure. In the announcement stage, employees formally notify others at work of their intentions to leave and deal with the news of their resignation spreading throughout their personal and professional networks (e.g., provide formal resignation notice, deal with the reactions of others, counteroffers, negotiations of notice period). Finally, employees (often) finish their time in the organization by working through the notice stage in which organizational members know of their upcoming departure (Klotz & Zimmerman, 2015). The focus of the current study is on the work and retirement factors that influence when a retiring worker enters the announcement stage of the resignation process (i.e., when the departing employees announce their retirement to their employer by providing resignation notice).

Only a few studies have examined employee resignation, and none have explicitly investigated the timing of resignation notice as the focal variable of interest or investigated employee resignation among retiring workers. Nonetheless, these studies have provided insight into the amount of notice departing workers provide their employer. For example, in an investigation of communication and sensemaking during organizational exit, departing workers varied greatly in the length of notice they provided to their employers (Klatzke, 2008). Although some employees provided months notice of their departure, others left immediately after announcing their resignation. Similar results were found in subsequent research, ranging from up to a year of advanced notice to leaving without giving notice at all (e.g., no call, no show; Klotz,

2013). Large differences in resignation notice have also been found among employees working within the same industry (Lee, Mitchell, Wise, & Fireman, 1996). Taken together, departing workers vary in how far in advance they notify their employer of their decision to leave, and individual differences and contextual factors likely contribute to the variance seen in the timing of resignation decisions.

Preliminary research has begun to investigate what individual and work factors influence the manner in which people resign. In his dissertation, Klotz (2013) identified seven distinct resignation styles that ranged along a constructive-destructive continuum in regard to how much employees attempt to minimize the impact of their departure on the organization and its members (Klotz, 2013). One of the key variables used to classify resignation styles was the length of time between resignation announcement and actual organizational exit (i.e., resignation notice), with more destructive styles associated with less notice.

Resignation styles were associated with specific attitudinal and behavioral antecedents (Klotz, 2013). Not surprisingly, aspects of the work environment related to interpersonal worker relationships (e.g., coworker satisfaction, leader-member exchange, abusive supervision) and employees' perceptions of their organization (e.g., psychological contract fulfillment, organizational justice, perceived organizational support) consistently predicted whether or not departing employees resigned in a more constructive or destructive manner. Moreover, over 40% of respondents reported that the strongest factor that influenced the timing of their resignation notice was their personal feelings toward their employer (e.g., general respect for employer, poor treatment by their boss or organization; Klotz, 2013). Although retirement was not the focus of this study, it is likely that similar factors influence the amount of notice retiring workers give their employers. Below I discuss the employee-organization relationship (EOR) from a social

exchange perspective and the push-pull model of retirement to explain how employees' attitudes and reasons for retiring may affect the timing of their resignation notice.

### **Employee-Organization Relationship Perspective on Retirement Notice**

Broadly speaking, employment can be viewed as a relationship of mutual exchange between employees and organizations. EOR is an umbrella term used to describe the quality and nature of this relationship (Coyle-Shapiro & Shore, 2007; Shore et al., 2004). Much of EOR research draws on social exchange theory (Gouldner, 1960; Blau, 1964) to understand how EORs develop and the mechanisms through which they influence employee attitudes and behavior (Settoon, Bennett, & Liden, 1996; Shore & Coyle-Shapiro, 2003; Shore, Coyle-Shapiro, & Tetrick, 2012; Wayne, Shore, & Liden, 1997). Central to the premise of social exchange is the ongoing mutual exchange of unspecified favors between parties such that when one party does a favor for another party there is an unwritten obligation that a favor be reciprocated in the future (Blau, 1964; Cropanzano & Mitchell, 2005). The long-term reciprocal exchange of favors between parties engenders a strong, positive relationship based on trust, mutual investment, and support. However, when rules of reciprocity are not followed, this can damage the social exchange relationship and may engender the undercompensated party to react in a negative manner (Coyle-Shapiro & Shore, 2007; Settoon et al., 1996; Shore et al., 2012; Shore, Tetrick, Lynch, & Barksdale, 2006).

The quality of EORs can lead to important differences in employees' attitudes and behavior directed at helping or harming the organization and its members (Kurtessis et al., 2015; Settoon et al., 1996). This may be especially true during the retirement resignation process because retiring workers' employment contacts are ending; they are less dependent on the organization, and therefore, have more freedom to engage in social exchange-driven behaviors.

Thus, to the extent to which more notice is perceived as a favorable resource to the organization, the amount of notice an employee provides may be influenced by the quality of EORs. For example, if retiring workers perceive the organization as treating their older workforce poorly then they may withhold disclosure of retirement plans out of spite (i.e., to get back at their employer) or out of fear (i.e., negative consequences of disclosing too early). This is consistent with research showing low quality EORs can elicit a negative norm of reciprocity that may result in counterproductive behaviors (Eisenberger, Lynch, Aselage, & Rohdieck, 2004), and greater organizational mistrust and fear of being exploited (Rousseau, Sitkin, Burt, & Camerer, 1998). In contrast, high quality EORs are associated with greater trust between parties and increased felt obligation directed toward helping each party achieve its goals and objectives (Coyle-Shapiro & Shore, 2007; Eisenberger, Armeli, Rexwinkel, Lynch, & Rhoades, 2001; Rhoades & Eisenberger, 2002). Therefore, positive EORs may promote an environment of on-going and open communication about retirement plans, which in turn may lead to earlier disclosure of retirement.

**Perceived organizational support.** Although there are a number of organizational factors that may influence the resignation process, perceived organizational support (POS) may be particularly informative as to when employees decide to give notice of their retirement. POS refers to employees' global perceptions about their organization concerning the extent to which they believe the organization values their contribution and cares about their wellbeing (Eisenberger, Huntington, Hutchison, & Sowa, 1986; Shore & Shore, 1995). POS is fostered by employees' tendency to personify organizations such that employees perceive the favorable or unfavorable treatment by the organization as an indication of how their organization feels about them (Eisenberger et al., 1986; Rhoades & Eisenberger, 2002). Cumulative evidence shows that

when organizations treat their employees favorably, employees generally reciprocate with more positive attitudes and behaviors that benefit the organization (Kurtessis et al., 2015; Rhoades & Eisenberger, 2002; Shore et al., 2006).

Positive outcomes associated with POS are thought to occur by eliciting employees' felt obligation and indebtedness, which is returned through increased affective commitment and greater effort to help the organization achieve its goals and objectives (Eisenberger et al., 2001; Rhoades, Eisenberger, & Armeli, 2001; Shore et al., 2006). Because abrupt employee departure can negatively impact organizations' ability to function successfully (Hancock, Allen, Bosco, McDaniel, & Pierce, 2013), the degree to which employees give advance notice may reflect how obligated they feel to reciprocate favorable treatment before leaving their organization.

Therefore, it is expected that:

***Hypothesis 1:*** POS is positively related to the length of retirement notice. That is, workers who report higher levels of POS will give their employers greater notice of their retirement compared to workers who experience lower levels of POS.

**Leader-member exchange.** Whereas POS can be conceptualized as a broader relationship of mutual exchange between employees and organizations, more focused, dyadic exchange relationships form between subordinates and their supervisors (Eisenberger, Shoss, Karagonlar, Gonzalez-Morales, Wickham, & Buffardi, 2014; Settoon et al., 1996). Leader-member exchange (LMX) describes the quality and nature of the exchange relationship between leaders and their followers (Dulebohn, Bommer, Liden, Brouer, & Ferris, 2012; Eisenberger et al., 2014; Graen & Scandura, 1987; Graen & Uhl-Bien, 1995). According to LMX theory, leaders develop unique relationships with their followers through differential treatment and patterns of exchange (Dulebohn et al., 2012; Eisenberger et al., 2014; Gerstner & Day, 1997;



Graen & Scandura, 1987; Henderson, Liden, Glibkowski, & Chaudhry, 2009). Research has consistently shown that the quality of exchange relationship between employees and their superiors are primary determinants of employees' work behavior (Dulebohn et al., 2012; Gerstner & Day, 1997; Ilies, Nahrgang, & Morgeson, 2007; Wayne et al., 1997). Low quality relationships are characterized by economic exchanges, which focus on fulfilling the formally agreed upon obligations specified in the employment contract. High quality LMX relationships, in contrast, transcend contractual obligations and are characterized by social exchange patterns, which engender feelings of mutual respect, trust, commitment and future obligation between leaders and followers (Graen & Uhl-Bien, 1995; Henderson et al., 2009; Liden, Sparrowe, & Wayne, 1997; Shore, Bommer, Rao, & Seo, 2009; Shore et al., 2006; Wayne et al., 1997). The development and maintenance of LMX relationships is based on the same principles as POS such that employees reciprocate favorable treatment by their supervisor through increased commitment and willingness to perform in ways that exceed their formal job description (Dulebohn et al., 2012; Eisenberger et al., 2014; Graen & Uhl-Bien, 1995; Ilies et al., 2007; Liden et al., 1997; Wayne et al., 1997).

Supervisors are central to the resignation process because employees often resign by giving notice to their supervisor. Further, the supervisor is often responsible for managing the exit and replacement of the departing employee (Klotz & Zimmerman, 2015). Thus, the quality of the supervisor-subordinate exchange relationship may be one of the strongest factors that influences when employees give retirement notice. Prior research has shown that employees' feelings toward their employer are strong determinants in how much notice employees provide (Klotz, 2013). LMX theory suggests that employees in high-quality exchange relationships will reciprocate favorable supervisor treatment by providing greater notice of their departure. Further,

high-quality LMX relationships are characterized by trust, which may lead employees to feel more comfortable discussing their retirement plans earlier and working for a supervisor that is aware of his or her departure. Therefore, it is expected that:

***Hypothesis 2:*** LMX is positively related to retirement notice. That is, workers who report high-quality LMX relationships will give their employers greater notice of their retirement compared to workers who report low-quality LMX relationships.

Although it is expected that both POS and LMX will influence the timing of retirement notice based on principles of social exchange, it is unclear whether retirement notice may be more strongly affected by the quality of organization exchange relationship or supervisor exchange relationship. In other words, is retirement notice more affected by the quality of the relationship with the organization as a whole or with a specific member (i.e., supervisor)?

Therefore, I pose the following research question:

***Research Question 1:*** Which exchange relationship (POS or LMX) accounts for more variance in the timing of retirement notice?

### **Reasons for Retirement on Retirement Notice**

Employee turnover has been investigated using process and content models. Process models of turnover address how people quit (decision pathways; Lee & Mitchell, 1994; Lee et al., 1996), whereas content models of turnover focus on why people quit (reasons for leaving; Maertz & Campion, 2004; Maertz & Griffeth, 2004). Investigating both reasons for leaving and the process through which people exit may provide important insights into the length of retirement notice given to employers. Research shows great variability in the events that initiate the turnover process (ranging from positive to negative, expected to unexpected, job-related to personal; Lee & Mitchell, 1994), the speed at which people leave, the degree to which leaving is

planned, and where people go after they leave (Hom et al., 2012; Lee et al., 1996; Maertz, & Kmitta, 2012). Reasons for leaving refer to employees' causal attributions for their job withdrawal (Maertz & Kmitta, 2012). These causal attributions typically derive from contextual push and pull factors that act concomitantly to influence preferences for and intentions to remain at work or retire (Barnes-Farrell, 2003; Shultz, Morton, & Weckerle, 1998). Push factors refer to the negative features of the work role/environment (e.g., job dissatisfaction) and/or the restrictive circumstances (e.g., poor health) that induce older workers to retire. In contrast, pull factors are typically the desirable aspects of retirement (e.g., opportunity to pursue leisure activities, spend time with family) that entice workers to retire (Barnes-Farrell, 2003; Shultz et al., 1998).

**Push reasons for retirement.** The extent to which employees feel pushed out of their work role and into retirement, as opposed to pulled toward retirement, may influence the timing of retirement notice. Retirements that are primarily driven by push factors are likely to be associated with less retirement notice, although the mechanism through which this occurs may differ depending on the push factors involved. For example, workers who are retiring to escape negative aspects of work, such as perceived age discrimination, workplace conflict, or stressful work conditions, may harbor negative feelings about their employer and as a result voluntarily withhold notice of their retirement. In contrast, push retirements that are due to restrictive circumstances that have limited one's ability to continue working (e.g., poor health, caregiving obligations) may also be negatively related to the length of resignation notice, however, the lack of notice may not be a conscious decision, but instead the result of an unplanned or unexpected retirement. Taken together, it is hypothesized that people who predominately attribute their reason for retirement to push-related factors will give less notice to their employer.

***Hypothesis 3:*** Push reasons for retirement are negatively related to retirement notice.

That is, workers who retire under negative circumstances will give less notice to their employer than those who retire under more positive circumstances.

As noted, retirements due to push reasons can result from negative aspects of the workplace, but they can also result from personal factors that restrict one's ability to work. Although it is expected that push retirements will be associated with less retirement notice overall, we do not know which push factors have the strongest relationship with resignation notice. That is, whether push reasons related to the work environment (e.g., work not recognized or appreciated) or those due to restrictive life circumstances (e.g., failing health) are associated with the length of retirement notice. Therefore, I pose the following research question:

***Research Question 2:*** Which push factors, those related to negative aspects of the work environment or those related to restrictive life circumstances, account for the most variance in the timing of retirement notice?

**Pull reasons for retirement.** Retirements that are primarily driven by pull factors are likely to be associated with greater retirement notice. The relationship between pull retirements and the timing of retirement notice follows the same logic outlined above. When workers retire because they are attracted to retirement, as opposed to feeling pushed out of the workplace, this implies that workers are retiring under more positive organizational circumstances. That is, pull retirement reasons are more likely to be non-work related and expected (Schlosser, Zinni, Armstrong-Stassen, 2011). This suggests that employees who perceive retirement as the greater of two goods, as opposed to the lesser of two evils, may provide employers more advanced notice of their intentions to retire because retirement is at no fault of the organization. In other words, employees may retire even though they are generally satisfied with their jobs and/or

organizations, but nonetheless ready to move on. Further, pull retirements are more likely to be planned (Noone, O'Loughlin, & Kendig, 2013), which may also provide retiring workers greater opportunity to give more advanced notice of their departure.

***Hypothesis 4:*** Pull reasons for retirement are positively related to retirement notice. That is, workers who retire under positive circumstances will give more notice to their employers than those who retire under more negative circumstances.

## METHOD

### Participants

Participants in the present study included individuals who retired within the last two years or planned to retire within the next year. The study aim was to examine factors related to the timing of retirement notice, therefore I excluded people who retired due to employer-initiated retirements (e.g., retirement due to terminations, layoffs) and self-employed individuals (i.e., did not have an employer to whom to give notice) from participating in the study. I also excluded individuals living or working outside of the United States because retirement practices and norms can vary by country (Peiro, Tordera, & Potocnik, 2013). The final sample ( $N = 105$ ) included 28 individuals who planned to retire within the next year and 77 individuals who reported retiring within the last two years. On average, retired individuals had been retired for 11.9 months ( $SD = 7.51$ ; range 1 – 24 months). The majority of the sample were female (69.6%), White (90.2%), married/partnered (80.4%), and held a graduate or professional degree (50%). The average age of respondents was  $M = 63.3$  ( $SD = 5.50$ ) years old, with a range from 44 to 83 years. On average, respondents had worked for the same employer for  $M = 21.3$  ( $SD = 11.6$ ) years and worked an average of  $M = 42.9$  ( $SD = 13.3$ ) hours per week. A little more than half of respondents were in non-supervisory roles (51.6%). The majority of the sample were salaried employees (77.7%), with a median annual gross individual salary of \$74,940.00, and were primarily employed in the education/educational services (37.1 %) and healthcare/health services (19%) industries. The majority of the sample (76.3%) was not working for pay in retirement (or did not anticipate working after they retired). On average, participants had (or expected upon retirement to have)  $M = 3.50$  ( $SD = 1.25$ ) sources of retirement income. See Table 1 for demographic characteristics and Table 2 for occupational and retirement characteristics.

## **Procedure**

I used a variety of online and in-person methods to recruit participants. I developed online recruitment materials that included a statement of the study's purpose, eligibility criteria, and a link to the online survey. I posted a brief advertisement about the project and link to the survey on Facebook (a social networking site), on a closed networking group account geared toward recent retirees, and disseminated materials to my personal contacts via email.

Additionally, my friends and colleagues also posted and shared recruitment materials on Facebook accounts and disseminated the materials to their contacts via email. Recruitment materials were also disseminated via email to various Listservs (e.g., the APA Occupational Health Psychology listserve, and the Psychology Department faculty, staff, and graduate student list for a university located in the Western United States), members of the Retired Senior Volunteer Program (RSVP) located in a large city in the Western United States, people retiring from a university located in the Western United States, and people retiring from a school district located in the North Eastern United States.

The survey of older adults poses unique methodological considerations. Limiting sampling and data collection to online methods may lead to sampling bias because adults age 55 or older differ in the adoption and use of newer information and communication technology (Quinn, 2010). In light of these considerations, I also developed and disseminated a traditional (offline) paper and pencil survey to mitigate sampling biases. Specifically, I posted recruitment flyers in community locations relevant to reaching the target population, such as local libraries and senior centers. Similar to the materials I developed for online recruitment, the flyers included a statement of the purpose of the study, eligibility criteria, and the researcher's contact information with instructions to contact the researcher (via phone or email) to arrange access to

the survey. Although recruitment efforts included both online and traditional (offline) methods of contact and survey form (online, paper-form), only one person responded to the flyers posted in the community and the respondent requested access to the online survey. As a result, all participants completed the survey online.

I recruited participants for this study using a variety of methods, including snowball sampling. Snowball sampling is a nonprobability sampling method in which existing participants assist in the recruitment of future subjects by identifying individuals within their social network who meet the sample criteria. In the recruitment materials, I asked people to share the study information with their contacts who meet the study criteria and may be willing to participate. Although there are limitations to this sampling methodology (primarily with respect to a lack of representativeness and possible selection bias which may limit the external validity of the sample; Atkinson & Flint, 2001), snowball sampling is advantageous for recruiting hard-to-reach populations and subgroups (Baltar & Brunet, 2012; Sadler, Lee, Lim, & Fullerton, 2010), such as individuals in the final stages of work withdrawal and early stages of retirement. For example, social networking sites in combination with snowball sampling have been found to be a particularly effective method to identify and recruit hard-to-reach populations, expand sample size, and reduce problems associated with selection bias and representation (Baltar & Brunet, 2012).

Participants accessed the survey by clicking on a link located in the recruitment materials, which directed them to a secure online survey administered on the CSU psychology Qualtrics platform. The survey began with an IRB-approved informed consent statement; participants needed to click “Agree” to continue to the survey. After consenting to participate in the study, respondents answered a series of questions to 1) confirm their eligibility (i.e., voluntarily retired



within the last two years; plan to retire within the next year; not self-employed/retired from a self-employed job) and 2) direct them to the appropriate survey based on their employment status (retired or working).

## **Measures**

This section provides details concerning the measurement of the work and retirement factors hypothesized to influence the length of resignation notice, resignation variables, and a variety of demographic and occupational characteristics. All questions in the survey referred to the job from which participants retired or are currently retiring. Given the sampling frame, I surveyed participants at different stages of the resignation and retirement process. To account for these differences, I developed three slightly different versions of the survey so that the words corresponded to participants' resignation and retirement status: a retiree survey (i.e., for participants that had completed the resignation process and had retired), a worker-resigned survey (i.e., for participants that were still working at their organization but had already resigned), and a worker-not resigned survey (i.e., for participants that were still working at their organization and had not yet resigned). Although the item wording sometimes differed across surveys, they were designed to measure the same constructs. To be concise, all sample items described in this section are from the retiree survey (i.e., worded to signify the person had already left his or her job). All items in each version of the survey are located in the Appendix.

**Perceived organizational support (POS).** I measured POS using Eisenberger, Cummings, Armeli, and Lynch's (1997) short version of the Survey of Perceived Organizational Support (SPOS; Eisenberger et al., 1986). The SPOS consists of eight items that are designed to measure the extent to which individuals feel their organization values their contribution and cares about their wellbeing. Prior research has demonstrated that the SPOS is a unitary factor

structure with high internal consistency ( $\alpha = .90$ ; Eisenberger et al., 1997). For the retiree survey, items were adapted from the present tense to the past tense. A sample item is, “My organization strongly considered my goals and values.” Participants rated their level of agreement with each statement using a 5-point Likert-type scale ranging from *strongly disagree* (1) to *strongly agree* (5). The SPOS scale had an acceptable reliability estimate in this study ( $\alpha = .90$ ).

**Leader-member exchange (LMX).** I measured LMX from the subordinates’ perspective (member LMX) using Scandura and Graen’s (1984) seven item scale. The scale was modified to accommodate the use of a 5-point Likert-type rating scale ranging from *strongly disagree* (1) to *strongly agree* (5). This modification is consistent with prior research (e.g., Liden, Wayne, & Stilwell, 1993; Wayne et al., 1997). For the retiree survey, I adapted items from the present tense to the past tense. A sample item is “My working relationship with my supervisor was effective.” Prior research has demonstrated criterion-related validity evidence for the member-LMX measure and several work behaviors (e.g., job performance, organizational citizenship behaviors, favor doing for manager; Wayne et al., 1997) and has demonstrated acceptable reliability estimates ranging from .80 to .90 (Liden et al., 1993). In this study, the LMX scale had an acceptable reliability estimate ( $\alpha = .95$ ).

**Reasons for retirement.** To test hypotheses 3 and 4, I generated a comprehensive list of reasons for retirement by drawing upon several existing scales. This included a 10-item measure from the HRS that has been used to assess the influence of push and pull factors on individuals’ retirement decisions (Shultz et al., 1998), a nine-item decision to retire push/pull measure (Schlosser et al., 2012), a 12-item Reasons for Retirement Questionnaire (RRQ; Robinson, Demetre, & Corney, 2010), and a 12-item measure generated by Bennett (2010) who examined the retirement decision-making process based on the unfolding model of turnover.

My goal was to compile a list of possible reasons for retirement that included both positive and negative circumstances for retiring. In developing this list, I sought to include reasons directly related to the work environment (e.g., limited advancement opportunities, achieved career goals) and reasons that were more personal in nature (e.g., experienced health problems, wanted to spend more time with friends and family). After I compiled and reviewed the list of reasons, I sought input and feedback from two subject matter experts (SMEs): my advisor (a retirement researcher) and a recent retiree. Based on my judgement and SME feedback, I eliminated, incorporated, and modified items from existing scales and added five additional items (e.g., no longer felt useful to the organization; make room for younger employees) based on the retirement literature for a more comprehensive list of reasons for retirement.

After dropping two items (as described in the psychometric properties section), the final list comprised 19 reasons for retirement, including 10 push reasons for leaving (i.e., retirement decision influenced by a negative circumstance) and nine pull reasons for leaving (i.e., retirement decision influenced by a positive circumstance). The push reasons can be further delineated into negative circumstances attributed to the workplace (e.g., treated poorly at work) and life outside of work (e.g., failing health). Similarly, the pull reasons can be differentiated based on work (e.g., achieved career goals) and non-work (e.g., wanted to spend more time with friends and family) domains. For each item, participants rated how important each reason was in their decision to retire on a Likert-type scale, ranging from *not important at all* (1) to *very important* (5). See Table 3 for a complete list of survey items and content origins.

**Resignation variables.** I measured the length of retirement notice in the retiree survey by asking, “When you resigned from your job to retire, approximately how much notice did you

provide your employer?” Respondents indicated the amount of notice they provided using three open-ended text boxes- one for “year(s)”, one for “month(s)”, and one for “day(s).” In the worker survey, participants that indicated that they had not yet resigned were asked, “When you resign, approximately how much notice do you anticipate providing your employer?”

Respondents indicated the amount of notice they provided using three open-ended text boxes- one for “month(s)”, one for “week(s)”, and one for “day(s). Finally, for workers that had already given notice, I calculated the length of resignation notice using the date that they plan to retire (“On what date do you plan to retire? Please enter the date mm/dd/yyyy”) and the date that they gave notice (“On what date did you give notice? Please enter the date: mm/dd/yyyy).” For example, one participant indicated that they gave notice on 07/19/2016 and planned to retire on 01/01/2017. The computed duration is 23.71 weeks or 23 weeks and five days from the day they gave notice to the day they retired (does not include the end date, i.e., the date they retired). To conduct analyses, I computed resignation notice into weeks for all participants.

To help minimize the possible bias associated with retrospective reporting, I used a three-item measure developed by Klotz (2013) to assess the degree to which participants recalled their resignation experience. A sample item is, “I can remember almost every detail of my resignation experience when I retired.” Responses were made on a five-point scale, ranging from *strongly disagree* (1) to *strongly agree* (5). The recall questions are similar in nature to those asked in other retrospective studies of employee turnover and employee resignation (e.g., Maertz & Kmitta, 2012; Klotz & Bolino, 2016). The resignation recall scale used in this study had a reliability estimate of  $\alpha = .64$ .

**Demographic, occupation, and retirement characteristics.** In addition to the measures described above, I collected demographic, occupation, and retirement information. Demographic

information included participants' age, sex, ethnicity/race, education, and marital status.

Occupational information, which related to the job participants retired from or are in the process of retiring from, included organizational tenure, number of hours worked per week, individual gross salary and payment type, job level, and industry. Retirement information included current or anticipated sources of retirement income and current or anticipated employment status in retirement (i.e., bridge employment, full retirement). See Appendix for all demographic, occupation, and retirement questions.

## RESULTS

### **Data Review and Cleaning**

Prior to conducting the primary analyses, I reviewed and cleaned the data. I first removed 62 ineligible respondents (based on the sample criteria), 24 respondents who dropped out during the screening questions, four respondents who ended the survey early and failed to provide data on the primary predictor variable, and one respondent who completed the survey, but skipped the question related to retirement notice (i.e., the primary criterion variable). Finally, four cases were identified as outliers on the dependent variable and two respondents reported low recollection of their resignation experience and therefore were excluded (described in greater detail below).

Next, I analyzed the dataset to determine missing data patterns as recommended by Tabachnick and Fidell (2013) and Rubin and Little (2002). Overall the dataset contained little missing data with less than 3.6% missing on any item. Gross annual pay and organizational tenure were the exception with 33.9% and 28.6% missing, respectively. However, I did not detect any systematic patterns of missing data.

I computed frequency distributions and descriptive statistics for each item to analyze the distribution of response and to identify outliers. I identified and removed four outliers on length of retirement notice due to being empirically different based on results from a standard deviation analysis (three standard deviations from the mean;  $M = 24.83$ ,  $SD = 25.39$ ) and by examining box plots. After excluding outliers, retirement notice ranged from 0 to 88 weeks notice. I removed two cases due to poor recall based on average resignation recall scores less than or equal to two, which indicates that these participants could not recall their resignation experience. This cutoff is consistent with prior research on employee resignation (Klotz, 2013).

Next, I investigated the normality, linearity, and homoscedasticity for the study variables to ensure that the data met the assumptions of linear regression. I assessed normality by visually inspecting histograms, skew and kurtosis values, and Kolmogoro-Smirnov (K-S) test of normality, which statistically tests the assumption that the sample data are drawn from a normally-distributed population. POS, LMX, and pull reasons for retirement were negatively skewed (skewness = -.659, -.975, -.498, respectively) indicating that the majority of the sample reported high levels of support from their organizations, positive leader-member relations, and more positive reasons for leaving, whereas the push reasons for retirement distribution was positively skewed (skewness = 1.189) indicating that fewer people endorsed negative reasons for leaving. With the exception of POS (K-S (105) = .085,  $p = .058$ ), all predictor variables showed a significant departure from normality as indicated by the K-S test (LMX: K-S (105) = .138,  $p < .001$ ; pull reasons: K-S (102) = .097,  $p = .020$ ; push reasons: K-S (102) = .149,  $p < .001$ ). I explored transformations to correct for normality. However, I used non-transformed data in the primary analyses because 1) assumptions of linear regression do not rely on predictor variables being normally distributed, 2) the pattern of results was consistent using transformed and untransformed variables, and 3) transformed parameters obfuscate interpretation.

Upon testing length of retirement notice for normality, results showed a positively skewed, leptokurtic distribution (skewness = 1.069, kurtosis = .683) that departed significantly from normality (K-S (105) = .174,  $p < .001$ ). To improve normality, I explored several transformations to correct for positive skewness. A logarithm transformation provided the best improvement to normality (skewness = -.327; kurtosis = -.582), however even after transformation there was still a significant departure from normality (K-S (105) = .123,  $p < .001$ ). Nonetheless, I conducted all analyses using the transformed variable because the skew and

kurtosis values improved and were within the range of acceptable values. Finally, I examined linearity and homoscedasticity through pairwise scatter plot analysis per the recommendations of Tabachnick and Fidell (2013). I did not find any problems among the study variables.

### **Statistical Analysis**

Next, I analyzed the data using a number of statistical methods. I computed descriptive statistics to assess central tendency and variability for all study variables (see Table 4), conducted confirmatory factor analyses to confirm the hypothesized factor structure for each scale and computed estimates of internal consistency reliability (i.e., Cronbach's alpha), and then tested the hypotheses using correlation and hierarchical linear regression.

**Psychometric properties.** Prior to testing the hypotheses, I conducted confirmatory factor analyses (CFA) to confirm the hypothesized factor structure for each scale. I examined several indices to determine how well the proposed model fit the data using model fit criteria suggested by Hu and Bentler (1999): comparative fit index (CFI) > .95, Tucker–Lewis Index (TLI) > .95, and root mean square error of approximation (RMSEA) < .06. In addition, I evaluated the chi-square test of model fit, where a non-significant value indicates perfect fit of the model to the data. However, the chi-square test of significance is sensitive to sample size (Raykov & Marcoulides, 2011). The overall pattern of fit indices suggested a moderate to poor fit to the observed data for both POS ( $\chi^2 = 61.46$ ,  $df = 20$ ,  $p < .001$ ; RMSEA = .14, CFI = .92, TLI = .88) and LMX ( $\chi^2 = 31.51$ ,  $df = 14$ ,  $p = .005$ ; RMSEA = .11, CFI = .98, TLI = .96).

Next, I conducted a CFA to test the hypothesized two-factor structure for the reasons for retirement scale with all 21 items included. Results showed a poor fit to the data ( $\chi^2 = 327.104$ ,  $df = 188$ ,  $p < .001$ ; RMSEA = .09, CFI = .72, TLI = .69). I removed two items that were push reasons for retirement (*Reached normal retirement age* and *Pressured to retire by family/friends*)



based on negative item-total correlation values. Negative item-total correlations suggest they represents the *opposite* of the rest of the scale (Raykov & Marcoulides, 2011). Although the push and pull scales were not written to be homogeneous, negative item-total correlations threaten the use of the scale to generally represent positive and negative circumstances for retirement. Further, the item content is more ambiguous compared to the other items in terms of the degree to which it is perceived as a negative circumstance (e.g., retiring because you reached normal retirement age is less indicative of a negative retirement circumstance especially compared to other reasons for retiring, such as one's job being eliminated). After removing the two items, the model fit improved ( $\chi^2 = 218.94$ ,  $df = 134$ ,  $p < .001$ ; RMSEA = .08, CFI = .81, TLI = .78) significantly over the first model ( $\Delta\chi^2 = 108.16$ ,  $\Delta df = 54$ ,  $p < .001$ ;  $\Delta CFI = .09$ ). See Table 3 for the item descriptive statistics and item-total correlations.

Next I computed Cronbach's alpha to assess the internal consistency of the scale. As reported in the measures section, POS and LMX demonstrated acceptable internal consistency with reliability estimates above .80 (Raykov & Marcoulides, 2011). The reliability estimate for the push and pull dimensions were  $\alpha = .82$  and  $\alpha = .53$ , respectively. Although the reliability estimate for the push dimension was at an acceptable level, the pull dimension showed poor internal consistency. As previously mentioned, this is to be expected given the nature of the measure. In this measure, people are endorsing whether each reason was an important factor in their decision to retire. Each reason, although related in terms of an underlying positive or negative evaluation of the reason (pull/push), is considered independent and therefore not necessarily highly correlated with each other or an underlying construct. Nonetheless, scale scores still give a snapshot of the overall reasons driving the respondents' retirement decision, and therefore are useful in testing the hypotheses.

**Hypothesis tests.** I tested hypotheses 1-4 by computing Pearson's  $r$  product-moment correlations. Hypotheses are supported if the predictor coefficient is significant at  $\alpha < .05$  and in the hypothesized direction (i.e., positive coefficient for H1, H2, H4 and negative coefficient for H3). I interpreted the correlations based on Cohen's (1988) conventions for describing small ( $r = |.10|$ ), medium ( $r = |.30|$ ), and large effects ( $r = |.50|$ ). See Table 4 for correlations between study variables.

**Hypothesis 1.** Hypothesis 1 indicated that POS is positively related to the length of retirement notice. Results showed POS was significantly related to length of retirement notice in the hypothesized direction ( $p = .005$ ), providing support for hypothesis 1. However, the size of the effect was small ( $r = .28$ ).

**Hypothesis 2.** Hypothesis 2 indicated that LMX is positively related to the length of retirement notice. Hypothesis 2 was not supported as results showed that LMX did not significantly relate to the length of retirement notice ( $p = .113$ ). Nonetheless, the relationship was in the hypothesized direction ( $r = .17$ ).

**Hypothesis 3.** Hypothesis 3 indicated that push reasons for retirement are negatively related to the length of retirement notice. Results showed a significant negative relationship between push reasons for retirement and length of retirement notice ( $p < .001$ ), providing support for hypothesis 3. This was a medium size effect ( $r = -.38$ ).

**Hypothesis 4.** Hypothesis 4 indicated that pull reasons for retirement are positively related to the length of retirement notice. Results showed pull reasons for retirement and length of retirement notice was positively related ( $r = .10$ ), however the correlation was not significant ( $p = .368$ ) Therefore, hypothesis 4 was not supported.

Next I explored a number of demographic and occupational characteristics as potential confounding variables. Job level was significantly related to length of retirement notice ( $r = .36$ ,  $p < .001$ ). Therefore, I next explored whether POS and push reasons for retirement added to the prediction of retirement notice over and above job level. That is, does POS and push reasons for retirement predict retirement notice after controlling for differences in job level? As seen in Table 5 and 6, results from hierarchical linear regression analyses indicated that adding POS to the model increased the amount of variance explained from 13% to 17% and adding push reasons for retirement to the model increased the amount of variance explained from 12% to 24%.

**Research Questions.** Research question 1 explores which exchange relationship (POS or LMX) accounts for more variance in the length of retirement notice. Because LMX was not significantly related to the length of retirement notice, I did not further examine research question 1. Research question 2 explores which push factors have the strongest influence on the length of retirement notice. Specifically, whether push reasons related to the work environment (e.g., work not recognized or appreciated) or those due to restrictive life circumstances (e.g., failing health) have a greater influence on the length of retirement notice. To answer this question, I examined the squared semi-partial correlations with job level as a control variable (i.e.,  $\Delta R^2$  represents the item's unique contribution after statistically controlling for job level, which was entered first into the model). As seen in Table 7, eight of the ten push reasons for retirement were significantly related to length of retirement notice after controlling for job level. Results show that variables related to the work environment had the largest influence on the length of retirement notice, whereas restrictive circumstances were less influential.

## DISCUSSION

The purpose of this study was to enhance our understanding of the retirement resignation process by investigating work and retirement factors related to the timing of resignation notice. By drawing on extant research and theory on the employee-organization relationship and the push-pull model of retirement, this study was able to identify several contextual factors that may play a role in when people decide to give their employer notice of their retirement. By doing so, this study has provided the first insights into the retirement resignation process, laid a foundation for future research on this topic, and provided practical recommendations for organizations to facilitate more open communication of retirement plans.

### **Summary and Interpretation of Results**

Consistent with research on employee resignation (Klotz, 2013), the length of notice provided by retiring workers varied widely. In this study, retirement notice ranged from no notice to over a year and a half of notice (i.e., 0 to 88 weeks), with an average of 21 weeks notice. Compared to prior research, retiring workers appear to give more notice than employees resigning for other reasons (e.g., leaving for another job, returning to school; Klotz, 2013). For example, the average length of notice for a sample of MBA students who had recently resigned in order to return to school was 4.3 weeks ( $SD = 1.7$ ) and in a more generalizable sample (i.e., voluntarily resigned or quit their full-time job in the past 12 months, excluding people who were terminated/fired or retired), the average notice period was 3.3 weeks ( $SD = 4.9$ ; Klotz, 2013). The differences in length of notice between retiring workers and those retiring for other reasons may be in part due to differences in job level (i.e., whether they were a non-supervisor, first-level supervisor, mid-level supervisor or manager, senior manager, executive level, or president/CEO) as older, retiring workers are more likely to be in positions of leadership (Davidson et al., 2007).

Indeed, the findings in this study showed that people in higher level positions within their organization gave significantly more notice of their retirement compared to those in lower level positions.

The first set of hypotheses explored the relation between the quality of employee-organization relationships, at the organization and supervisor level, and the timing of retirement notice. Based on EOR and social exchange theory, I hypothesized that perceptions of organizational support and high quality leader relations would be positively related to retirement notice because employees would be inclined to return favorable treatment from their organization and/or supervisor by providing more advanced notice of their retirement. Retirement resignation decisions may be especially influenced by exchange-based attitudes, as resigning presents one of the last opportunities for employees to engage in social exchange-driven behaviors by reciprocating favorable treatment (i.e., more notice) or attempting to correct the perceived exchange inequity (i.e., less notice) with fewer consequence (i.e., resigning employees are less dependent on the employment relationship). In addition to reciprocating treatment via retirement notice, perceptions of support from one's organization and a high-quality relationship with one's supervisor (or lack thereof) may also create conditions that foster earlier (later) disclosure of retirement via reduced (increased) fear of the consequences associated with disclosing too early.

I found mixed support for the hypotheses. Hypothesis 1 was supported; I found a significant positive relationship between POS and length of retirement notice such that employees who perceived higher levels of support from their organization gave more notice of their retirement. Although the size of the effect was small, POS added to the prediction of retirement notice over and above job level. That is, regardless of an employee's level of job

position within the organization, the degree to which the employees felt supported by his or her organization explained variance in the timing of their retirement notice. In contrast, I did not find support for hypothesis 2, which proposed that LMX positively relates to the timing of retirement notice. That is, the quality of the relationship with one's supervisor did not influence the amount of notice retiring workers provided their employers in this sample.

Although the mixed findings were somewhat surprising, prior research about employee resignation suggested a nuanced relationship between styles of resignation, POS, and LMX. For example, POS was found to be positively related to grateful goodbye resignations, whereas LMX was not, and LMX was found to be positive related to in the loop resignations, whereas POS was not (Klotz, 2013). Grateful goodbyes and in the loop resignations are two styles of resignation characterized as positive in nature (i.e., constructive opposed to destructive) and associated with longer notice periods. However, they differ in that in the loop resignations are preceded by informal disclosure of resignation plans prior to giving formal notice, whereas grateful goodbyes are characterized by expressions of gratitude and offers to do what he or she can to minimize the impact of his or her departure (Klotz, 2013). In this study, I measured *formal* retirement notice given to one's employer and therefore did not capture whether employees *informally* discussed their retirement intentions with their supervisor. It may be that LMX is associated with informal disclosure of retirement plans to one's supervisor, but not related to the formal disclosure of retirement plans to the organization. Thus, a worker who has a high-quality relationship with his or her supervisor may informally notify the supervisor (allowing the supervisor to plan for their departure) long before giving formal notice to the organization. In this case, an employee's desire to reciprocate favorable treatment at the supervisor level may be fulfilled via informal disclosure, not formal retirement notice. Future research should explore the relationship between

LMX and informal disclosure of retirement plans. Additionally, compared to other employee populations supervisor relations may be less influential for retiring workers given their level within the organization (e.g., they may work more independently, fewer tiers of supervision) and overall perceptions about their organization may be more impactful. Thus, future research should explore the relationship between resignation notice and LMX among different populations of workers, such as those leaving for destinations other than retirement (e.g., resigning to work at a different job, resigning to start own company, resigning to going back to school, resigning to care for a child or caregiving responsibility). These results provide support for EOR and social exchange theory and add to the literature demonstrating that LMX and POS are theoretically and empirically distinct social-exchange constructs.

The second set of hypotheses investigated the relation between conditions under which people retire and the timing of retirement notice. Drawing on the push-pull model of retirement, I hypothesized that retiring under more negative conditions (i.e., endorsing more push reasons for retirement) is negatively related to the timing of retirement notice, whereas retiring under more positive conditions (i.e., endorsing more pull reasons for retirement) is positively related to the timing of retirement notice. Because push retirements are associated with negative aspects of the work environment and/or restrictive life circumstances preventing continued work, I argued that people “pushed” into retirement may purposefully withhold notice because they are angry at their organization (similar to righting a perceived exchange inequity) or fear consequences of disclosure, or that they retire unexpectedly due to unforeseen circumstances (e.g., failing health, caregiving responsibility), which prevents them from providing greater notice of their retirement. Following similar logic, I hypothesized that pull retirements are associated with greater retirement notice because pull retirements are typically planned in advance, so the employee has

time to allow for advanced notice, and pull retirements are not associated with negative work conditions, thus, there is less of a reason to purposefully withhold notice.

I found mixed support for the reasons for leaving hypotheses. In support of hypothesis 3, I found a significant relationship between push reasons for retirement and retirement notice in the hypothesized direction. People who endorsed leaving under negative conditions gave significantly less notice than those leaving under more positive conditions. Push reasons for retirement added to the prediction of retirement notice over and above job level. This suggests that regardless of an employee's level within the organization, the extent to which the employee departed under negative circumstances is related to the length of notice provided to the organization. Of all study variables, push reasons for retirement had the strongest relationship with retirement notice, demonstrating a medium size effect. To further explicate this relationship, I explored push reasons for retiring at the item level and investigated whether push reasons related to the work environment (e.g., work not recognized or appreciated) or those due to restrictive life circumstances (e.g., failing health) had a greater influence on the length of retirement notice. Results showed that push reasons related to the work environment had considerably larger influence on retirement notice than those related to restrictive circumstances.

EOR and social exchange theory may be used to elucidate how push reasons for leaving differently relate to the timing of retirement notice. For example, employees who are retiring due to negative aspects of their work environment likely perceive an exchange inequity with their employer which they have the power to correct by giving less notice of their departure. Because individuals are retiring, they are likely to feel greater freedom to engage in social exchange-driven behavior, whether constructive or destructive. In contrast to retiring due to negative aspects of work environment, retiring due to restrictive circumstances (that are personal in



nature, e.g., failing health, caretaking responsibilities) are less likely to influence the quality of EORs. Thus, results suggest negative aspects of the work environment may elicit negative attitudes toward the organization, which may in turn lead employees to purposefully withhold notice. In contrast, retiring due to restrictive circumstances, although negative, may not elicit negative attitudes toward the organization, and therefore, the employees are less likely to purposefully withhold notice. Among the reasons for retirement due to restricted circumstances, only retiring health problems was related to retirement notice (caregiving responsibilities was not). However, it is unclear whether people gave less notice because their retirement was unexpected (less time to give notice) or because they purposefully withheld notice because they were angry at their organization for not providing appropriate accommodations that would allow them to continue working. Indeed, the findings show that lack of accommodations for older workers was more strongly associated with retirement notice than retiring due to poor health. Future research should further explicate the relation between motives for providing retirement notice and reasons for leaving.

In contrast, I did not find support for hypothesis 4, which proposed that pull reasons for retirement would be positively related to retirement notice. Consistent with the previous discussion, the lack of association between pull reasons for retirement and retirement notice may be due to the fact that most pull reasons for leaving did not directly pertain to the employment relationship and instead were more personal in nature. It may be that retiring under positive circumstances does not necessarily elicit employees' felt obligation to return favorable treatment via greater retirement notice. Indeed, I did not find a significant relationship between pull reasons for leaving, POS, or LMX. Thus, it appears that even if an employee is retiring under positive conditions, it does not mean he or she will hold positive exchange-based work attitudes.

Further, retirements characterized by pull reasons for leaving are generally thought to be well planned (opposed to retiring abruptly due to unforeseen circumstances), which suggests that even when someone knows well in advance that they are going to retire, it does not necessarily mean they will provide greater notice of their retirement. However, this is speculative because I did not directly measure retirement planning variables. These results provide support for the push/pull model of retirement (Barnes-Farrell, 2003; Shultz et al., 1998) and emphasize the importance of distinguishing between push and pull reasons for retirement.

In conclusion, POS appears to be an important work factor related to the timing of retirement notice. It is hypothesized that being treated well by one's organization elicits employees' felt obligation to reciprocate favorable treatment, which is returned by providing more notice of their departure. In this sample, global perceptions of support and the quality of the organization exchange-relationship were found to be more influential than more proximal perceptions of support and the quality of the supervisor exchange-relationship. Further, it appears that the conditions under which people retire play a role in the timing of retirement notice, although only when the conditions relate to negative aspects of the work environment and to a lesser extent, personal restrictive life circumstances. Of all study variables, endorsing negative reasons for retirement associated with the work environment explained the most variance in the timing of retirement notice.

### **Practical Implications**

Knowing when older workers plan to retire is critical for an organization's succession planning efforts and human capital strategy. Central to this issue is the communication of retirement information, particularly the disclosure of retirement plans. The findings from this study point to several workplace factors that may facilitate or inhibit the communication of

retirement information, and therefore, have important implications for managers and HR personnel. First, the positive relationship between POS and retirement notice suggest that organizations should foster a supportive work environment for older workers by proactively managing the reciprocal relationship between themselves and their older workforce. Although there is a notable lack of research investigating POS among older adults, perceptions of support may be fostered via HRM policies and practices supportive of older workers (Wang & Zhan, 2012). HRM policies may serve as important indicators of organizations' investment in and support of its older workers, which may in turn influence the quality of EORs. For example, quality health benefits, flexible work arrangements and retirement options, equal access to training and development opportunities, and initiatives that support the employability of older adults may promote high quality EORs and foster a positive age climate and in turn demonstrate to older workers that their organization values them (Armstrong-Stassen & Ursel, 2009; Boehm, Kunze, & Bruch, 2014; de Lange, Kooij, & van der Heijden, 2015; Posthuma, Wagstaff, & Campion, 2012; Wang & Zhan, 2012).

Additionally, the item-level investigation into push reasons for leaving provide important insights into what specific aspects of the work environment and personal circumstances relate to retirement notice. I identified eight reasons for retirement that were associated with less retirement notice. Although each reason is different, there are several recommendations I explain below that could help mitigate several of the negative experiences that contributed to participants' retirement decision. Further, many of the recommendations could also improve employees' perceptions of their organizations' support of older workers.

First, organizations should promote an on-going career and professional development dialogue between managers and employees at all career stages, including late-career workers,

and training and development opportunities should be available for workers of all ages. Open and continuous communication about career development (and motives/desire for continued work or retirement) could help ensure employees and employers work-related objectives concerning current and future work are being met, and may provide an opportunity to address and resolve negative circumstances that are pushing people out of the workforce. For example, limited advancement opportunities, disliked the work, and possibility of job being eliminated were the top three correlates with retirement notice. It is unclear if workers' perceptions of limited advancement opportunities or the possibility of losing their job are real or unfounded. Nonetheless, these issues could be addressed in career development meetings. For example, if unfounded, this type of discussion could ease the employee's fear of losing his or her job and also alert the manager to the employee's desire for advancement. The employee and manager could then discuss different training and development opportunities to meet the needs of the employee and the organization. Further, taking on new and challenging tasks may lead to increased satisfaction with one's work. If employees' perceptions about limited advancement opportunities and/or possibility of losing their job were in fact true, career development meetings may provide valuable information about the situation (e.g., why someone is unable to advance at this time, why the organization is laying off workers) and may provide an opportunity to discuss potential solutions that meet the needs of the employee and the organization (e.g., move to part time work, take on a new exciting project without an increase in salary or a change in job title). Even if the outcome does not change, on-going and open career discussions may increase the transparency of work decisions (understand how and why work decisions are being made versus speculating), which may perceptions of procedural justice and therefore not damage the quality of supervisor and organization-relations.

Second, organizations should ensure the work environment accommodates workers of all ages. This would address two push reasons for retirement associated with less retirement notice: a lack of accommodations for older workers and experiencing health problems. Although job performance does not decline with age (Ng & Feldman, 2008), the aging process is associated with changes in certain physical and cognitive abilities (e.g., declines in physical strength, hearing and vision, cognitive processing speed, and working memory; Fisher, Chaffee, Tetrick, Davalos, & Potter, 2017) that can make work increasingly difficult as people age. In light of these changes, organizations may try to reduce the physical demands (e.g., make sure work station is designed to optimize human performance, provide more breaks) and/or the cognitive load of the job (e.g., take advantage of new technologies that organize and automate work processes, provide visual cues) to fit the individual worker. They could also provide employees with greater autonomy to engage in job crafting and use personal strategies to compensate for age-related changes. Job crafting is a mechanism through which older employees can continuously adjust their job to mitigate the intrapersonal changes associated with the aging process and thereby maintain fit with their work environment (de Lange et al., 2015). In addition to job and task redesign and job crafting, organizations may provide alternative work arrangement, such as telecommuting and reduced work hours, to accommodate older workers.

Finally, organizations should also consider implementing a mentoring program that pairs older, more experienced workers with younger, less experienced workers. As people age, they tend to gain experience and have higher levels of task-related expertise (Wang & Zhan, 2012). Moreover, research has found that generativity (i.e., passing their knowledge and skills to younger generations) is an important work motive for older adults (Dendinger, Adams, & Jacobson, 2005). Developing a mentoring program that pairs more experienced and less

experienced workers could be particularly advantageous for employees and employers; it could fulfill important needs for older adults, facilitate the transfer of important job and organizational knowledge, and address several push reasons for retirement (e.g. work not recognized or appreciated, no longer feeling useful to the organization).

### **Limitations**

This study is not without limitations. First, all variables were measured from a single source (workers) at a single time point, which poses the risk that the findings are influenced by common method variance (Podsakoff, MacKenzie, Lee, & Podsakoff, 2003). However, the aim of the study was to examine retirement notice as it relates to employees' perceptions about their organization and supervisor and the reasons underlying their decision to retire. Therefore, in this initial study, it seems appropriate to collect data solely from employees. In the future, work should replicate and extend these findings by incorporating data from multiple sources (e.g., supervisors, employment records) and multiple time points (as retirement resignation is a process that unfolds over time) to help reduce common method variance.

An additional limitation is that the findings may be biased due to when people reported on their resignation. Specifically, results may be biased due to retrospective sensemaking (Weick, 1979) as respondents reported on experiences that occurred up to two years prior. To help mitigate the possible bias associated with retrospective reporting, I measured the extent to which participants agreed they could recall their resignation experience and excluded the two participants that disagreed. Further, retrospective survey methodology is common in the examination of turnover and employee resignation (e.g., Bennett, 2010; Klatzke, 2008; Klotz, 2013; Lee & Mitchell, 1994; Lee, Mitchell, Holtom, McDaneil, & Hill, 1999; Maertz & Campion, 2004; Maertz, & Kmitta, 2012). In this literature, recall bias is less of a concern given

that turnover and the resignation process is considered a salient, major life event (see Lee et al., 1999 for review). Research suggests that salient events increase people's ability to remember details surrounding such events relatively easily (Tourangeau, 2000). To this end, the resignation process, especially with regard to retirement, should be particularly salient. Several studies have shown resignations are emotion-filled events in employees' lives (Klatzke, 2008; Klotz, 2013). Additionally, included in this sample were employees that were planning to retire within the next year, some of whom had not yet given notice of their retirement. There is no research to estimate how well intentions to give a certain amount of notice predict the actual amount of notice given. However prior research has shown a moderate correlation between intentions to quit and actual turnover ( $p = .45$ ; Griffeth, Hom, & Gaertner, 2000). I did not find significant differences on any of the predictor or outcome variables between individuals prospectively (i.e., not yet resigned) and retrospectively (i.e., already retired) reporting their resignation experience. Nonetheless, future research should attempt to survey individuals repeatedly as they proceed through the resignation process (i.e., before and after they have given retirement notice).

In addition, the sampling methodology used in this study limited the generalizability of the sample. Specifically, the sample was almost exclusively white (90.2 %), highly educated (50% held either a graduate or professional degree), and earned income well-above the national average (median personal income in this sample was \$74,940, compared to the national median of \$30,240; U.S. Census Bureau, 2016). It is important to note, however, that this is a hard-to-reach population given the frequency of the event (i.e., giving notice to retire from your career job is presumably a once in a lifetime event) and the insights gained from this study are nonetheless important given that it is the first investigation of retirement resignation. Future research should attempt to replicate and extend these findings in samples that are more

representative of the general population in terms of demographic and occupational characteristics.

### **Future Directions**

Future research can build on these findings in a number of ways. First, future research should replicate and extend these findings by examining additional factors at the individual, relational, and organizational level that may be related to the timing of retirement notice. For example, this study did not explore the influence of personality, organizational commitment, job stress, coworker relations, abusive supervision, age discrimination and diversity, organizational justice, and work norms and HR policies related to resignation and retirement. It would also be advantageous to investigate alternative mechanisms through which favorable treatment by one's organization may influence the timing of retirement notice. For example, in addition to felt obligation, POS theory suggests that perceptions of support elicit psychological investment in the organization via socioemotional need fulfillment, which in turn engenders organizational attachment and identification (Rhoades & Eisenberger, 2002). That is, when employees perceive their organization values and cares about their wellbeing they are likely to "incorporate organizational membership and role status into their social identity" (Rhoades & Eisenberger, 2002, p. 699). Thus, employees could provide more notice because they want to reciprocate favorable treatment or they could provide more notice for self-enhancement purposes because they identify with the organization. Further, because trust is an essential component to the development and maintenance of high quality exchange relationships (Coyle-Shapiro & Shore, 2007), trust at the organizational and supervisor level should also be explored. It may be that trust in one's organization is the underlying mechanism driving the relationship between perceptions of support and the timing of retirement notice.



As mentioned, retirement intentions may also be communicated informally. Informal disclosure is an important avenue for future research as we do not know who retiring employees informally disclose their retirement plans to (e.g., supervisors, coworkers, subordinates, customers), their reason for disclosure (e.g., information seeking, support, sensemaking), or how these informal conversations influence the work attitudes and behaviors of each party. For example, if the retiring worker expresses positive feelings about the organization and its members during these discussions, this voicing behavior may reinforce organizational commitment and satisfaction among employees. In contrast, retiring workers who view the organization, aspects of their job, or certain people at work negatively may feel more free to voice their grievances, which may in turn lead to negative organizational outcomes (e.g., job dissatisfaction, lower moral counterproductive work behaviors, turnover, loss of customers).

In addition, it would be advantageous to learn more about how retiring employees and organization negotiate organizational exit. Specifically, what individual, work, and retirement factors relate to employees' and organizations' willingness to negotiate resignation and/or retirement plans (e.g., delaying resignation until a replacement is selected and trained or renegotiating the employment contract to stay with the organization in some capacity)? This is a critical area for investigation if the goal is to optimize retirement transitions that benefit both workers and organizations. Further, it would be opportune to use qualitative and quantitative methods to investigate how these conversations take place.

Another area for investigation within the retirement resignation domain is how retiring workers' attitudes and work-related behaviors change after they have made the decision to retire but before they have left the organization. For example, are there changes in work performance, safety compliance, counterproductive work behavior, or work engagement? Similarly, how does

the resignation process and eventual retirement of an organizational member affect the attitudes and behaviors of others at work and organizational functioning as a whole? For example, does a person's retirement prompt other older workers to retire or begin to think about retirement (e.g., spark a retirement contagion effect)? Similarly, do subordinates who are strongly committed to their leader also decide it is time to move on when their leader retires? Beyond actual retirement, how do the attitudes and behaviors of workers change as a function of how someone resigns (e.g., timing of resignation, voicing behavior)?

## **Conclusions**

This study provided the first insights into the resignation and disclosure process for retiring workers and demonstrated that work and retirement factors play a role in how retiring workers separate from their organization. By doing so, this study added to the black box of employee resignation (Klotz & Zimmerman, 2015) and helped to bridge the turnover-retirement gap. Findings from this study may help organizations better predict and plan for the departure of their older workforce. Organizations should consider incorporating age-friendly HRM policies and practices and make efforts to foster a supportive work environment to both strengthen the quality of EORs and to help mitigate negative work conditions that push employees out of the workforce and into retirement. More importantly, this study is a step toward understanding how retirement conversations unfold in the workplace. If practitioners are to help workers and employers negotiate retirement transitions that are mutually beneficial, this type of research is essential.

Table 1  
*Sample Demographic Characteristics*

Variable	%
Gender	
Female	69.6
Male	30.4
Age (years)	
40 – 49	1.0
50 – 59	19.8
60 – 69	69.3
70 – 79	8.9
80 – 89	1.0
Marital Status	
Single, never married	3.9
Single, divorced or separated	11.8
Single, widowed	3.9
Married/partnered/cohabitating	80.4
Race/Ethnicity	
African-American/Black	1.0
American Indian/Alaska Native	0.0
Asian/Pacific Islander	2.9
Caucasian/White (non-Hispanic)	90.2
Hispanic/Latino	2.9
Multiracial/multiethnic	2.0
Other	1.0
Education	
Didn't complete high school	0.0
High school or GED	6.9
Some college or 2-year degree	17.6
4-year college degree	25.5
Graduate or professional degree	50.0

Table 2  
*Occupational and Retirement Characteristics of the Sample*

Variable	%	<i>M</i>	<i>SD</i>	<i>Median</i>	<i>Range</i>
Organizational tenure (years)		21.31	11.60	23.42	.83 - 45
Hours worked per week		42.93	13.33	43.00	8 - 80
Individual gross salary		\$95,756	\$104,480	\$74,940	\$12,262 - \$870,038
Payment type					
Salaried	77.7				
Hourly	22.3				
Job Level					
Non-supervisor	51.6				
First-level supervisor	5.3				
Mid-level supervisor or manager	11.6				
Senior manager	16.8				
Executive level	12.6				
President/CEO	2.1				
Industry					
Agriculture	1.0				
Education and Educational services	37.1				
Finance/Insurance/Real estate	2.9				
Government	8.6				
Healthcare /Health services	19.0				
Information Technology	2.9				
Legal	2.9				
Manufacturing	5.7				
Professional and Business Services	3.8				
Retail Trade	3.8				
Transportation	2.9				
Other	9.5				
Employment status in retirement					
Completely retired	76.3				
Part-time bridge employment	21.4				
Full-time bridge employment	2.2				
Sources of retirement income					
Social Security/other gov't benefits	68.6				
Defined Benefit Plan	56.2				
Defined Contribution Plan	56.2				
Other individual retirement account	57.1				
Personal savings and/or investments	62.9				
A job that you are working	10.5				
A job that your partner is working	21.9				
Other	5.7				
Total sources of retirement income		3.49	1.25	3.00	1 - 7

Table 3

*Reasons for Retirement—Item Generation, Descriptive Statistics, and Item-total Correlations*

Item	<i>M</i>	<i>SD</i>	Item-total Correlation
<b>Push reasons</b>			
Work not recognized or appreciated <sup>3, 4</sup>	2.17	1.48	.70
Limited advancement opportunities <sup>3</sup>	1.85	1.26	.40
Disliked the work <sup>4</sup>	2.13	1.40	.53
No longer felt useful to the organization <sup>5</sup>	1.92	1.28	.63
Pressured to retire by people at work <sup>2</sup>	1.29	.75	.49
Treated poorly at work <sup>3</sup>	2.04	1.39	.71
Lack of accommodations for older workers <sup>4</sup>	1.40	.96	.59
Possibility of the job being eliminated <sup>1</sup>	1.20	.63	.37
Reached normal retirement age <sup>2*</sup>	2.86	1.37	-.10
Experienced health problems <sup>1, 2, 4</sup>	1.77	1.34	.28
Care-giving responsibilities <sup>1, 2, 4</sup>	1.80	1.19	.23
Pressured to retire by family/friends <sup>5*</sup>	1.72	1.48	-.04
<b>Pull reasons</b>			
Could afford to retire <sup>1</sup>	4.30	1.06	.27
Achieved career goals <sup>1</sup>	3.31	1.48	.27
Make room for younger employees <sup>5</sup>	1.59	.10	.21
Offered incentive to retire <sup>1</sup>	1.41	1.06	.09
Freedom for family/hobbies/travel/slowing down <sup>1, 3</sup>	4.23	1.11	.32
Other work opportunities <sup>2</sup>	1.60	1.15	.19
Time to enjoy retirement while in good health <sup>5</sup>	4.43	1.00	.35
Family/friends retiring <sup>2, 4</sup>	2.33	1.50	.26
Confidence in finding future employment if desired <sup>5</sup>	2.00	1.32	.20

*Note:*  $N = 102$ . The scale begins with “Below is a list of reasons why some people retire. For each reason, please rate how important each was in your decision to retire.” Response scale ranged from *not important at all* (1) to *very important* (5). Item content developed from: <sup>1</sup>Bennett, 2010; <sup>2</sup>Robinson, Demetre, & Corney, 2010; <sup>3</sup>Schlusser, Zinni, & Armstrong-Stassen, 2011; <sup>4</sup>Shultz, Morton, & Weckerle, 1998; <sup>5</sup>new item. \*removed from final analysis.

Table 4  
*Descriptive Statistics and Correlations for Study Variables*

	<i>N</i>	<i>M</i>	<i>SD</i>	1	2	3	4	5
1. Retirement notice (# of weeks)	105	21.35	18.20					
2. Perceived organizational support	105	3.62	.95	<b>.28</b>				
3. Leader-member exchange	105	3.82	1.08	.17	<b>.74</b>			
4. Pull reasons for retirement	102	2.78	.56	.10	.27	.04		
5. Push reasons for retirement	102	1.76	.75	<b>-.38</b>	<b>-.40</b>	<b>-.55</b>	.12	
6. Job level	95	2.40	1.63	<b>.36</b>	.30	.11	.10	-.10

*Note:* Retirement notice used in correlations is log transformed. Bolded correlations indicate  $p < .01$ , two-tailed test

Table 5

*Hierarchical Regression Predicting Retirement Notice from POS and Job Level*

	Model 1		Model 2	
	$\beta$	<i>SE</i>	$\beta$	<i>SE</i>
Job level	.36***	.02	.29**	.03
Perceived organizational support			.22*	.04
Adjusted $R^2$	.12		.15	
$R^2$	.13		.17	
$\Delta R^2$			.05*	

*Note:* Retirement notice is log transformed. \*  $p < .05$ , two-tailed, \*\*  $p < .01$ , two-tailed, \*\*\*  $p < .001$ , two-tailed.

Table 6

*Hierarchical Regression Predicting Retirement Notice from Push Reasons for Retirement and Job Level*

	Model 1		Model 2	
	$\beta$	<i>SE</i>	$\beta$	<i>SE</i>
Job level	.34***	.03	.31***	.02
Push reasons for retirement			-.35***	.05
Adjusted $R^2$	.11		.22	
$R^2$	.12		.24	
$\Delta R^2$			.12***	

*Note:* Retirement notice is log transformed. \*  $p < .05$ , two-tailed, \*\*  $p < .01$ , two-tailed, \*\*\*  $p < .001$ , two-tailed.



Table 7

*Correlation and squared semipartial correlations for push reasons for retirement and length of retirement notice.*

Reason for retirement	<i>r</i>	<i>sr</i> <sup>2</sup>
Limited advancement opportunities	-.32**	.10**
Disliked the work	-.30**	.06**
Possibility of the job being eliminated	-.29**	.08**
Work not recognized or appreciated	-.27**	.05*
Lack of accommodations for older workers	-.26**	.06**
Treated poorly at work	-.25*	.05*
Experienced health problems	-.24*	.05*
No longer felt useful to the organization	-.22*	.04*
Care-giving responsibilities	-.12	.02
Pressured to retire by people at work	-.11	.01

*Note:* Retirement notice is log transformed. *r* = Pearson correlation coefficient; *sr*<sup>2</sup> = squared semipartial correlation, controlling for job level. \* *p* < .05, two-tailed, \*\* *p* < .01, two-tailed, \*\*\* *p* < .001, two-tailed.

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## APPENDIX

## Demographics

1. Please select your gender
  - a. Male
  - b. Female
2. What is your age in years?
3. What is your current marital status?
  - a. Single, never married
  - b. Single, divorced or separated
  - c. Single, widowed
  - d. Married/partnered/cohabitating
4. Which racial or ethnic group best describes you?
  - a. African American or Black
  - b. American Indian or Alaska Native
  - c. Asian or Pacific Islander
  - d. Caucasian or White (non-Hispanic)
  - e. Hispanic or Latino
  - f. Multiracial or Multiethnic
  - g. Other (please specify): \_\_\_\_\_
5. What is the highest level of education completed?
  - a. Did not complete high school
  - b. High school diploma or GED
  - c. Some college or 2-year degree
  - d. 4-year college degree
  - e. Graduate or professional degree

## Worker Survey - Occupational Characteristics

The questions throughout this survey refer to your organization and job position from which you are retiring.

- 1. How many hours do you typically work per week?**
- 2. Is this position salaried or are you paid by the hour? Please specify your annual salary or hourly pay.**
  - a. Salaried. What is your GROSS ANNUAL salary (before taxes)? Example: If your salary is \$40,000, report 40000 not 40. \_\_\_\_\_
  - b. Paid by the hour. What is your HOURLY pay? Indicate dollars.cents per hour \_\_\_\_\_
- 3. How long have you worked for your current organization?**
  - a. \_\_\_\_\_ years \_\_\_\_\_ months
- 4. Please indicate as best you can the level of your job within the organization.**
  - a. Non-supervisor
  - b. First-level supervisor
  - c. Mid-level supervisor or manager
  - d. Senior manager
  - e. Executive level
  - f. President/CEO
  - g. Not sure
- 5. Which best describes the industry in which you work?**
  - a. Agriculture
  - b. Construction
  - c. Education and Educational services
  - d. Finance/Insurance/Real estate
  - e. Government
  - f. Healthcare /Health services
  - g. Hospitality/Service industry
  - h. Information Technology
  - i. Legal
  - j. Manufacturing
  - k. Media
  - l. Non-Profit
  - m. Professional and Business Services
  - n. Retail Trade
  - o. Transportation
  - p. Other (please specify): \_\_\_\_\_



## Retiree Survey - Occupational Characteristics

The questions throughout this survey refer to the organization and job position from which you retired.

- 1. How many hours did you typically work per week?**
- 2. Was this position salaried or are you paid by the hour? Please specify your annual salary or hourly pay.**
  - a. Salaried. What was your GROSS ANNUAL salary (before taxes)? Example: If your salary was \$40,000, report 40000 not 40. \_\_\_\_\_
  - b. Paid by the hour. What was your HOURLY pay? Indicate dollars.cents per hour \_\_\_\_\_
- 6. How long did you work for your former organization?**
  - a. \_\_\_\_\_ years \_\_\_\_\_ months
- 7. Please indicate as best you can the level of your job within the organization.**
  - a. Non-supervisor
  - b. First-level supervisor
  - c. Mid-level supervisor or manager
  - d. Senior manager
  - e. Executive level
  - f. President/CEO
  - g. Not sure
- 8. Which best describes the industry in which you worked?**
  - a. Agriculture
  - b. Construction
  - c. Education and Educational services
  - d. Finance/Insurance/Real estate
  - e. Government
  - f. Healthcare /Health services
  - g. Hospitality/Service industry
  - h. Information Technology
  - i. Legal
  - j. Manufacturing
  - k. Media
  - l. Non-Profit
  - m. Professional and Business Services
  - n. Retail Trade
  - o. Transportation
  - p. Other (please specify): \_\_\_\_\_

## Worker Survey- Retirement Characteristics

- 1. When you retire, which of the following will be sources of income? Check all that apply. (If you don't know, your best guess is fine.)**
  - a. Social security and/or other government benefits (e.g., Veterans, Disability)
  - b. Defined Benefit Plan (income from an employer pension where the amount you received is based on a formula involving age, years of service, and salary)
  - c. Defined Contribution Plan (income from a pension in which you and/or your employer contributed money that accumulated in a retirement account, such as a 401k or 403b plan)
  - d. Other individual retirement account (IRA)
  - e. Personal savings and/or investments (rents, royalties, estates, or trusts)
  - f. A job in retirement that you'll be working
  - g. A job that your spouse/partner will be working
  - h. Other (please specify) \_\_\_\_\_
  
- 2. When you retire, do expect to continue working for pay?**
  - a. Yes, I plan to continue working for pay full-time
  - b. Yes, I plan to continue working for pay part-time
  - c. No, I do not plan to work for pay in retirement
  - d. Other (please specify): \_\_\_\_\_

## Retiree Survey- Retirement Characteristics

- 1. When you retire, which of the following will be sources of income? Check all that apply. (If you don't know, your best guess is fine.)**
  - a. Social security and/or other government benefits (e.g., Veterans, Disability)
  - b. Defined Benefit Plan (income from an employer pension where the amount you received is based on a formula involving age, years of service, and salary)
  - c. Defined Contribution Plan (income from a pension in which you and/or your employer contributed money that accumulated in a retirement account, such as a 401k or 403b plan)
  - d. Other individual retirement account (IRA)
  - e. Personal savings and/or investments (rents, royalties, estates, or trusts)
  - f. A job in retirement that you are currently working
  - g. A job that your spouse/partner is currently working
  - h. Other (please specify) \_\_\_\_\_
  
- 2. Which best describes your current employment status?**
  - a. Completely retired, and NOT working or looking for paid work
  - b. Retired and working for pay full-time
  - c. Retired and working for pay part-time
  - d. Retired and not working for pay, but looking for paid work

## **Ability to Recall Resignation Experience**

(Klotz, 2013)

Items:

1. I cannot recall my resignation experience.
2. I can recall my resignation experience as if it just happened.
3. I can remember almost every detail of my resignation experience.

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*Note.* Items were rated on a 1 to 5 scale where 1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree nor Disagree, 4 = Agree, 5 = Strongly Agree. Item 1 is reverse coded.

## Retiree Survey- Perceived Organizational Support Scale

(Eisenberger et al., 1997)

Items:

1. My organization cared about my opinions.
2. My organization really cared about my well-being.
3. My organization strongly considered my goals and values.
4. Help was available from my organization when I had a problem.
5. My organization would have forgiven an honest mistake on my part.
6. If given the opportunity, my organization would have taken advantage of me.
7. My organization showed very little concern for me.
8. My organization was willing to help me when I need a special favor.

---

*Note.* Items were rated on a 1 to 5 scale where 1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree nor Disagree, 4 = Agree, 5 = Strongly Agree. Items 6 and 7 are reverse coded.

## **Worker Survey- Perceived Organizational Support Scale**

(Eisenberger et al., 1997)

Items:

1. My organization cares about my opinions.
2. My organization really cares about my well-being.
3. My organization strongly considers my goals and values.
4. Help is available from my organization when I have a problem.
5. My organization would forgive an honest mistake on my part.
6. If given the opportunity, my organization would take advantage of me.
7. My organization shows very little concern for me.
8. My organization is willing to help me when I need a special favor.

---

*Note.* Items were rated on a 1 to 5 scale where 1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree nor Disagree, 4 = Agree, 5 = Strongly Agree. Items 6 and 7 are reverse coded.

## Retiree Survey- Leader-Member Exchange

(Scandura & Graen, 1984)

Items:

1. I could count on my supervisor to "bail me out," even at his or her own expense, when I really needed it.
2. My supervisor understood my problems and needs.
3. My supervisor recognized my potential.
4. My supervisor had enough confidence in me that he/she would defend and justify my decisions if I were not present to do so.
5. I usually knew where I stood with my supervisor.
6. My working relationship with my manager was effective.
7. Regardless of how much power he/she had built into his/her position, my supervisor would be personally inclined to use his/her power to help me solve problems in my work.

---

*Note.* Items were rated on a 1 to 5 scale where 1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree nor Disagree, 4 = Agree, 5 = Strongly Agree.

## Worker Survey- Leader-Member Exchange

(Scandura & Graen, 1984)

Items:

1. I can count on my supervisor to "bail me out," even at his or her own expense, when I really need it.
2. My supervisor understands my problems and needs.
3. My supervisor recognizes my potential.
4. My supervisor has enough confidence in me that he/she would defend and justify my decisions if I were not present to do so.
5. I usually know where I stand with my supervisor.
6. My working relationship with my manager is effective.
7. Regardless of how much power he/she has built into his/her position, my supervisor would be personally inclined to use his/her power to help me solve problems in my work.

---

*Note.* Items were rated on a 1 to 5 scale where 1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree nor Disagree, 4 = Agree, 5 = Strongly Agree.



## **Push-Pull Reasons for Retirement**

(Developed for this study)

Items:

1. Work not recognized or appreciated
2. Limited advancement opportunities
3. Disliked the work
4. No longer felt useful to the organization
5. Pressured to retire by people at work
6. Treated poorly at work
7. Lack of accommodations for older workers
8. Possibility of the job being eliminated
9. Experienced health problems
10. Care-giving responsibilities
11. Could afford to retire
12. Achieved career goals
13. Make room for younger employees
14. Offered incentive to retire
15. Freedom for family/hobbies/travel/slowing down
16. Other work opportunities
17. Time to enjoy retirement while in good health
18. Family/friends retiring
19. Confidence in finding future employment if desired

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*Note.* The scale begins with “Below is a list of reasons why some people retire. For each reason, please rate how important each was in your decision to retire.” Items were rated on a 1 to 5 scale where 1 = Not Important at All, 2 = Slightly Important, 3 = Moderately Important, 4 = Important, 5 = Very Important. Items 1-10 are push reasons and items 11-19 are pull reasons.