Management PhD Research Project Proposal

Project title: **Understanding and Supporting the Transition to Retirement: Organizational Practices and Employee Wellbeing**

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Abstract
This research project explores the dynamics of retirement transitions in contemporary organizations, with a particular focus on how institutions can better support older workers during this significant life change. As patterns of work and retirement continue to evolve, there is a need to understand how organizations can develop comprehensive, employee-centered approaches to retirement transitions that prioritize worker wellbeing while meeting organizational objectives. This research initiative encompasses multiple angles of investigation, including psychological, social, and organizational dimensions of retirement transitions. Using qualitative methodologies, the various trends of research aim to generate deep insights into the lived experiences of transitioning workers, organizational best practices, and the development of innovative support frameworks that can enhance both individual and organizational outcomes.

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Project description

The nature of retirement is evolving in contemporary society. Traditional views of retirement as a clear-cut endpoint to working life are being challenged by more complex and nuanced transitions, influenced by various economic, social, and organizational factors such as increased longevity, changing economic conditions, evolving workplace dynamics, and shifting social expectations. These changes present both challenges and opportunities for organizations and their aging workforce.

Research suggests that the transition to retirement can significantly impact individuals' psychological wellbeing, identity, and social relationships (see Wang & Shi, 2014; Caines et al., 2024). However, organizational approaches to supporting this transition often remain focused primarily on financial and administrative aspects, potentially overlooking crucial psychosocial dimensions that could enhance retirement outcomes.

The role of organizations in facilitating positive retirement transitions has become increasingly important. While organizations have implemented various support mechanisms—such as flexible work arrangements and phased retirement programs, there is a crucial gap in understanding which approaches are most effective and how they can be tailored to diverse workforce needs. For example, while organizations use mentoring for knowledge transfer, there remains significant potential to explore how mentoring might be specifically adapted to support retirement transitions. Furthermore, the intersection of retirement transitions with other important organizational considerations, such as age-inclusive workplace cultures, intergenerational relationships, mentoring and knowledge transfer, and employee wellbeing programs, presents rich opportunities for research that could inform both theory and practice.

This project provides the flexibility to explore a broad range of topics, aiming to address, but not limited to, the following research questions:

Research Questions

1. How do older workers experience and make sense of the retirement transition process within organizational contexts, and what factors influence their psychological wellbeing and adjustment during this period?

2. What organizational practices and policies effectively support positive retirement transitions, and how do these vary across different industries, organizational cultures, and worker demographics?

3. What are the experiences and needs of diverse groups of older workers (considering factors such as gender, socioeconomic status, occupation type, and cultural background) during the retirement transition process?

4. How might mentoring relationships be specifically designed and implemented to support retiring employees' wellbeing and adjustment, beyond traditional knowledge transfer objectives?

5. What role do psychological factors (identity, self-efficacy, perceived organizational support) play in shaping retirement transition experiences, and how can organizations address these factors through targeted interventions?

Further reading

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