

## Principal Role in Teachers' Early Retirement Intention: A Case Study

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**Abstract:** Early retirement among teachers is a pressing issue affecting education systems worldwide, including Malaysia. Its impacts are far-reaching, leading to teacher shortages, disruptions in student learning outcomes, and increased costs associated with replacing and training educators. This study examines the factors influencing teachers' intentions to retire early and explores the role of school principals in mitigating these factors, with a particular focus on transformational leadership. Employing a qualitative case study approach, the research investigates the experiences of a mid-career teacher in a Malaysian public school, who also serves as an interim principal, providing perspectives as both a teacher and a leader. The findings indicate that early retirement intentions are driven by contextual factors (such as workload and policy changes), personal factors (including ageing, health, and family commitments), and organisational factors (notably leadership and work environment). Transformational leadership emerges as a pivotal strategy for addressing these challenges. Principals exhibiting transformational leadership traits—such as inspiring confidence, fostering motivation, encouraging innovation, and offering individualised support—were found to significantly reduce burnout and enhance teacher retention. This study underscores the importance of principal leadership in cultivating supportive environments that empower teachers and enhance their job satisfaction. It recommends equipping future principals with transformational leadership skills and calls for systemic reforms, including workload reduction through digitalisation and the provision of adequate administrative support, to ease the pressures faced by teachers. The research contributes to the discourse on teacher retention by highlighting the critical role of leadership in countering early retirement trends. It suggests future investigations into the mechanisms of effective principalship and the scalable application of transformational leadership practices. Addressing this challenge is essential for ensuring the sustainability of high-quality education systems and national development.

**Keywords:** Early retirement, transformational leadership

### 1. Introduction

Early retirement among teachers harms a nation, not only in the education sector but also in various fields that impede the nation's development in the long run. While retirement can be understood as a complete exit from a long-term organisational job or career path before retirement age (Mustapha et al., 2023), early retirement usually has a negative connotation. Early retirement is related to one's strategy to "reduce their attachment to work and close a process of gradual psychological disengagement from working life" (Topa et al., 2018, p.1), and such a trend has detrimental effects on the education system (Li & Zhao, 2022; Muhammad et al., 2022).

Looking into the factors that lead to early-retirement decisions and high turnover rate among teachers, past studies shown factors such as heavy workload and burnout (Keogh & Roan, 2016; Li & Zhao, 2022; Mustapha et al., 2023), administration conflict and changes in management approaches (Keogh & Roan, 2016; Li & Zhao, 2022; Mustapha et al., 2023), principal leadership (Kim, 2019; Kuo & Tsai, 2023; Zhao et al., 2023), and teachers' technology efficacy (Mustapha et al., 2023) influence teachers' intention to leave the teaching profession. Numerous studies show the factors leading to early retirement decisions, and policymakers have taken some actions to countermeasure the effect of early retirement of teachers in Malaysia, such as incentive schemes and career improvement programs (Mustapha et al., 2023). However, it seems like we are in no way close to finding the panacea to the problem, as the trend is predicted to persist (Li & Zhao, 2022). Hence, there is a pressing need to explore the factors that lead to teachers'

intention for early retirement, especially in identifying school principals' role in influencing teachers' early retirement intention. Hence, this study investigates the teachers' perspective on school principals' role in their intention to retire early.

### 1.1 Research objectives and research questions

The objective of this case study is to investigate the phenomenon of teacher's early retirement in Malaysia schools. The research objective and questions are developed accordingly:

RO1: To explore the factors influencing a teacher's intention to retire early.

RO2: To investigate the principal's role in influencing the teacher's intention to retire early.

The study addressed the following research questions:

RQ1: What factors influence a teacher's intention to retire early?

RQ2: How do leadership influence a teacher's intention to retire early?

## 2. Literature review

Early retirement is "the full exit from an organisational job or career path of long duration, decided by individuals of a certain age at the mid or late career before mandatory retirement age" (Topa et al., 2018, p.1). Early retirement is often related to one's intention to reduce attachment to work, hurting one's work performance.

### 2.1 Early retirement among teachers and its impacts on education

When such an intention to disengage from work happens to teachers, it hurts the education system and national development in the long run. Teachers choose to leave the teaching profession because their "opportunity costs outweigh the rewards gained from teaching" (Brown & Wynn, 2009, p.41) or when their difficulties or dissatisfaction are so great that they give up their past effort in work (Kim, 2019).

Early retirement of teachers, or attrition, can have a detrimental impact on student learning by creating a hostile school climate and on the implementation of the curriculum, as well as creating staff shortages and costs in preparing replacement teachers (OECD, 2020). In the 2018 TALIS report, it is shown that, on average, across the OECD countries, about a quarter of teachers plan to leave the teaching profession within the next five years due to stress (OECD, 2020). Kim (2019) asserts that teachers tend to leave schools with poor working conditions, which makes it difficult for them to teach.

In Malaysia, there is an apparent decline in the number of Malaysian teachers from 2017 to 2021 (Li & Zhao, 2022). Like Li and Zhao, a study from Germany found that heavy workloads cause mental health issues among part-time teachers, leading to their early retirement intention (Seibt & Kreuzfeld, 2023). Owing to this, the quality of education will likely suffer when the student-teacher ratio gets higher due to a higher number of teachers' early retirement. Likewise, the study showed that high teacher turnover rates have worsened the situation, creating unstable learning environments (DeMatthews et al., 2021) and further impeding students' learning outcomes. When there is a shortage of teachers, the principal's effectiveness in managing human resources to keep the school running is highlighted as a principal's most important role is related to recruiting, hiring, inducting, and retaining teachers (DeMatthews et al., 2021).

### 2.2 Principal's role in teachers' intention for early retirement

Principal leadership significantly impacts teachers' intention to retire (Keogh & Roan, 2016; Kim, 2019; Zhao et al., 2022). Kuo and Tsai (2023) posit that effective leadership of the principal can be measured through the teachers' retention rate, as they found that leadership is significantly related to teachers' intention for retention. Likewise, DeMatthews et al. (2021) study found that schools that experience chronic principal turnover threaten school stability, school improvement, and working conditions, eventually leading to teachers' intention to leave the school.

Kim (2019) posits that past studies have shown that leadership effectiveness, as perceived by teachers, is significantly related to their intention to leave the teaching profession. Kim further posits that we should focus on the three

aspects of a principal’s leadership: 1) instructional leadership, 2) leadership in managing students’ behaviours, and 3) leadership in creating a supportive school culture. In addition, as Kuo and Tsai (2023) assert, a single leadership style rarely solves all educational issues, and each style seems to have its strengths and weaknesses.

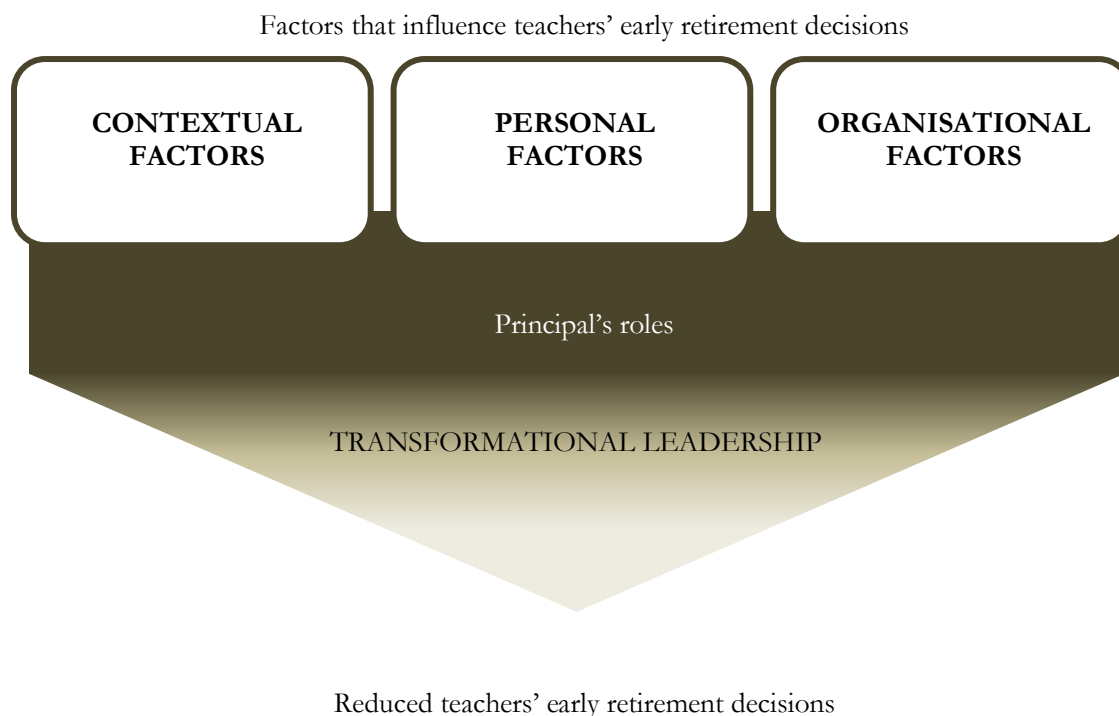
### 2.3 Theoretical & conceptual framework

Bass introduced transformational leadership in 1985 (Holst, 2021). He described it as a process where the leader becomes the source of inspiration, boosting followers’ confidence and expanding their interests. Transformational leadership has four sub-dimensions; see Table 1 for the four dimensions.

**Table 1 four dimensions of transformational leadership through the IR 4.0 concept (Prestiadi et al., 2020).**

Dimensions	Description
Idealised influence	<b>Leaders’ behaviours that lead to respect and confidence</b>
Inspiration motivation	<b>Leaders’ behaviours that are inspiring and motivating</b>
Intellectual stimulation	<b>Leaders who can come up with new ideas and provide possible solutions</b>
Individualised consideration	<b>Leaders who listen attentively to followers</b>

Kuo and Tsai (2023) found that transformational leaders reduce teachers' intention to leave the teaching profession, which provides “teachers with expectations and responsibilities to the schools they served” (Kuo & Tsai, 2023, p.7). Nevertheless, Kim (2019) asserts that principals’ activities that support specific aspects of teachers’ jobs have a more direct influence on teacher turnover. Hence, this led to the conceptual framework of the present study, which proposes that transformational leadership influence a principal’s effectiveness in mitigating various factors that influence teachers’ intention to retire early (see Figure 1).



**Figure 1. Conceptual framework: Role of principals in influencing teacher’s intention to retire early**

As shown in Figure 1, factors influencing teachers’ intention to retire early could be derived into three categories: 1) contextual factors refer to the broader environmental influences within the educational system, including radical changes brought by educational transformation, workload, and policy change; 2) personal factors refer to individual

characteristics that influence teachers' thoughts, feeling, behaviours and decision-making processes, including ageing, mental and physical health issues, and intention to spend more time with other commitments; and 3) organisational factors refer to how the institution manages workflow, including leadership, relationship with colleagues, and change in workflow.

A principal will filter these factors to mitigate the impact of those factors on teachers' intention to retire early. Transformational leaders are found to provide teachers with expectations and responsibilities, which help secure the stability of the school (Kuo & Tsai, 2023). Leaders who display the four transformational leadership dimensions will alleviate the impact of the factors on teachers' intention to retire early, including 1) idealised influence, where principals' behaviours form role models for teachers to emulate; 2) inspirational motivation, where principals motivate and fuel teachers' passion in teaching; 3) intellectual stimulation, where principals react and respond to teachers' problems at work; 4) individualised consideration, where principals open up for communication.

Hence, this framework proposes that principals could mitigate the effect of contextual, personal, and organisational factors that lead to teachers' intention to retire early by displaying the four transformational leadership dimensions.

### 3. Methodology

The present study is a qualitative study utilising a case study approach, one of "the most extensively used strategies of qualitative social research" (Priya, 2021, p.94). A case study approach is an empirical inquiry that investigates a phenomenon in a real-life context (Yin, 2009, as cited by Priya, 2021). The present study investigates the phenomenon of teachers' early retirement in Malaysian public schools and explores the impact of leadership on this phenomenon.

This study is explanatory in design as it is set forth to "answer the questions of 'how' and 'why' of the existence of a social reality" (Priya, 2021, p.104). The objective of the present study is to investigate how teachers come to decisions for early retirement and why leadership matters in mitigating the impact of various factors contributing to teachers' intention for early retirement. The present study also adopts a single case design, which is the most common in case study research design, with the following conditions (Priya, 2021): 1) the case under study is unique – the participant is a teacher intended to retire early and currently working as an interim principal who has the unique experience as subordinate and leader; 2) the case is used to test a hypothesis – the present study aims to test if principal plays a role between factors and teachers' intention to retire early; and 3) the case under investigation is a classic example of a particular phenomenon under investigation – the participant offers an opportunity to explore the lived experience of a Malaysian public school's teacher and discuss the role of a principal in mediating the impact of various factors to teachers' intention to retire early.

Data was collected using a semi-structured interview based on the research questions of the present study. Purposive sampling is applied to select participants for this study. The participant is a female teacher in her mid-career with 16 years of teaching experience. Her school is a Malaysian public primary school located in Lundu, Sarawak. Her current role is interim principal, while she also holds the roles of student-affair vice principal and teacher of the Malay and Chinese language, art, and music. In addition, she leads the school's Crime Prevention Club.

Data collected through the semi-structured interview is then analysed. Creswell and Guetterman (2019) suggest that data analysis involves first "developing a general sense of the data" and then "coding the description and themes" accordingly (Creswell & Guetterman, 2019, p. 273). Creswell suggests six steps in the coding process, which include reading the text data thoroughly and then dividing the text into different information segments where the researcher could label each segment with codes. Then, the researcher could reduce overlapped and repeated codes along the way. The final step involves collapsing codes into themes.

### 4. Finding and discussion

#### 4.1 Factors leading to teachers' intention for early retirement

The present study investigates the factors leading to teachers' intention to retire early. The participant holds multiple roles in the school, from a teacher who teaches to an interim principal who manages. Hence, she offered a unique

viewpoint encompassing a teacher’s and principal’s perspectives. When asked why she intends to retire early, she critically analysed and listed the factors that brought her to her early retirement decision, which can be derived into three categories: contextual factors, personal factors, and organisational factors. See Table 2 for a summary of the factors leading to the participant’s intention to retire early.

**Table 2 factors that influence teachers’ intention to retire early**

Categories	Factors	Participant’s Responses
Contextual	Workload/stress Radical changes in educational policy	“education is a very stressful job”, “heavy workload”, “burnout” “have problems adjusting to educational transformation”
Personal	Family commitment Ageing Health issues Motivation/ job satisfaction	“other life commitment”, “want more time and freedom” “age is another factor”, “teachers’ stamina declines with ageing”, “have mental health issues” “Lose hope and passion”, “it fuels their passion and motivation”
Organisational	Parental and administrative support Career development opportunities Work environment Leadership	“Can’t get enough support from parents and schools”, “by giving teachers more support and care... less likely to retire” “should provide the opportunity for better career development” “improving work environments” “principal plays a huge role”

The present study found that teachers’ intention to retire early is influenced by contextual factors, including heavy workloads that bring stress, and some teachers, according to the participant, “have problems adjusting to educational transformation” and organisational factors including parental and administrative support, career development opportunities, work environment, and leadership. These findings are also consistent with the findings from Mustapha et al.’s (2023) study, where they found that contextual factors, such as job burnout and workload, as well as organisational factors, such as organisational conflict, affect teachers’ intention to retire early. Likewise, Keogh and Roan (2016) also found that organisational factors involving a change in school management will lead to work intensification, the addition of non-core workloads, and amplified conflicts that confront teachers.

However, the present study’s participant listed more personal factors related to her intention to retire early, including ageing, choosing family over profession, health issues, motivation, and job satisfaction. The present study’s findings are consistent with Casely-Hayford et al.’s (2022) study, which found that teachers’ intention to remain in the profession is mainly related to personal factors, including teachers’ perceived health state, work motivation, and collegial support. A healthy working environment is also reported to be essential for teachers’ retention (Casely-Hayford et al., 2022). Likewise, Muhammad et al. (2022) and Mustapha et al. (2023) found that health is one of the main personal factors that lead to teachers’ intention to retire early.

In addition, the participant believes that “a positive environment” is vital for teachers’ retention, and she highlights the importance of “providing them with systemic support” to help reduce teachers’ intention to retire early. Consistent with Casely-Hayford et al.’s (2022) and Topa et al.’s (2018) findings, promoting a healthy working environment and positive organisational climate for teachers can help with teachers’ retention, the present study’s participant believes that “a positive work climate could really improve teachers’ job satisfaction and sense of

belonging, which reduces their intention to leave early.”

Casely-Hayford et al.’s findings suggest that personal factors such as motivation and collegial support are related to teachers’ intentions to leave the profession. The present study found that motivation and job satisfaction play a role in teachers’ intention to leave the profession earlier. The participant, when asked how important it is for teachers to feel empowered in their job, responded with:

*It is very important that teachers feel empowered in their jobs. Empowering teachers means they can participate in decision-making related to schools’ policies and developmental directions, use their expertise and experience, and impact students’ development and the school’s climate.*

This finding is consistent with the study conducted by Kuo and Tsai (2023), which found that leaders who provide teachers with a clear set of expectations and responsibilities can improve the school’s stability, especially among senior teachers who value order and structure. When the school environment is stable, teachers are less likely to leave. In contrast, Hsu et al. (2015) found that teachers with greater job control and self-efficacy tend to have a greater intention to retire early as the researchers believe that higher efficacy teachers face more demand from schools and parents and, consequently, endure more stress in their jobs and have a higher intention to retire early.

#### 4.2 Transformational leadership and teachers’ intention to retire early

The present study observed that contextual, personal, and organisational factors influence teachers’ intention to retire early. The present study also aims to explore leaders’ role in mitigating those factors’ impact on teachers’ retention. The present study found that leaders can mitigate teachers’ intention to retire early despite various factors impacting their motivation and passion for teaching. When asked about her experience working with a principal, how the principal’s leadership approach affected her job, and the type of principal she wanted to work closely with, she described her principal’s characteristics that resemble a transformational leader. See Table 3 for a summary of her responses and transformational leadership dimensions.

**Table 3 Principal’s leadership and transformational leadership qualities**

Transformational leadership dimensions	Participant’s responses
<i>Idealised influence</i> is displayed when the leader “envisions a desirable future, articulates how it can be reached, sets an example to be followed, sets high standards of performance, and shows determination and confidence” (Bass, 1999, p. 11).	“sets the direction and goals for the school”, “I want to work with a principal... who walks the talk, who can be a role model...”
<i>Inspirational motivation</i> refers to a leader’s ability to inspire and motivate others (Pretiadi et al., 2020).	“my principal is a good motivator”, “motivates us to participate actively in the school’s development and planning”
A leader displays <i>intellectual stimulation</i> when facilitating innovative and creative thoughts in followers (Bass, 1999).	“help us to work better”, “stimulate teachers’ potential and creativity”, “set up a workgroup where we can exchange ideas and information”
<i>Individualised consideration</i> is displayed when leaders pay attention to followers’ developmental needs and provide opportunities for growth and development through task delegation (Bass, 1999).	“Cares about teachers’ needs”, “provide what we need... resources, support”, “shares these goals with the teachers”, “give them a sense of direction”, “really cares about teachers’ professional development”

The present study’s findings are consistent with Zhao et al.’s (2022), and Kuo and Tsai’s (2023) findings, which found that transformational leadership positively relates to teachers’ intention for retention. The present study observed that transformational leaders can mitigate the impact of various challenges and issues that lead to teachers’ intention to retire early. For instance, the participant mentioned that her principal’s concern about her needs and providing her with necessary support and resources make her feel appreciated and, thus, able to work better.

## 5. Conclusions and recommendations

Early retirement among teachers brings detrimental effects to schools, students, society, and the nation. In this case study, teachers' intention to retire early is found to be affected by contextual factors (workload, stress, radical changes in the educational landscape), personal factors (family commitment, age, health issues, motivation and job satisfaction), and organisational factors (parental and administrative support, professional development opportunities, work environment, and leadership). The present study also found that the principal is essential in mitigating the impact of these factors on teachers' intention to retire early.

Although numerous countermeasures, such as incentives and improvements, have been taken against the increasing number of early retirements among Malaysian teachers (Mustapha et al., 2023), Li and Zhao (2022) predict the trend will likely persist. However, as the present study found, leaders play a significant role in mitigating the impact of various factors on teachers' intention to retire early. Policymakers and ministries should prepare future principals who possess the leadership qualities of transformational leaders. In addition, we should pay attention to the fact that our teachers are overworked, and the call to lessen their workload has become louder. One way to lessen teachers' workload is through digitalisation, which focuses on changing the way of work mediated by technology. Another way to lessen teachers' workload, as this study observed, involves providing them with administrative support, including continuous professional development opportunities, various teaching resources, and empowering teachers in their innovative teaching practices.

## 6. Limitations

This study acknowledges two limitations. First, it was a single-case study that provided data that offered in-depth, personalised viewpoints but with limited generalisability. Secondly, the study explored the role of principles in mitigating the impact of various factors on teachers' intentions to retire early without exploring how it happens. For further research, it is relevant to explore the mechanism of principalship in teachers' early retirement.

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