

Downsizing and Voluntary Severance: The Survivor

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INTRODUCTION

As part of the National Technological University (NTU) Master of Science degree in the Management of Technology (MOT), students work on an individual research project. This article is a summary of my recent field research for such an MOT project. This article looks at downsizing approaches, examines how survivors respond in both layoffs and voluntary programs and closes with some recommendations on how to be more effective when using downsizing.

EXECUTIVE SUMMARY

"I'm still standing ... feeling like a true survivor..."
- Elton John

Many terms describe a common business phenomenon: downsizing, layoffs, right-sizing, restructuring, work-force reductions, et cetera. Over the last 15 years, this has been of growing interest to both the management research community and corporate America. Layoffs are generally seen as bad and voluntary programs are viewed as a good approach to downsizing - they are often held up as positive examples of how to approach downsizing.

However, survivors tend to not receive adequate attention in either approach. The focus of this research is the survivor. A key result is that for the survivor, voluntary severance is very much like a layoff. The research shows that management does not pay adequate attention to the survivor and the impact

of the downsizing on their job. The encouraging aspect of this is that downsizing can be managed effectively and to greater benefit. The keys to being effective are: clear downsizing goals, good processes, clear communication, an understanding of the human impact of change and employee involvement.

DOWNSIZING

"All great changes are irksome to the human mind, especially those which are attended with great dangers and uncertain effects."
- John Adams, letter to James Warren

Downsizing is not a current or passing fad in the workplace. Businesses and organizations of all types and sizes are downsizing. Various downsizing programs in the United States have cut 3.4 million jobs from the Fortune 500 list of firms as of July 1992 [Lee 92]. IBM and Apple have subsequently downsized on the heels of previous downsizing. In spite of the visibility given downsizing at U.S. firms, this is not an American phenomenon - the same is occurring in Europe and Japan. Downsizing is not a one time event, indications are that once organizations use downsizing, its use will continue.

There are three approaches [Tomasko 91, Lawrence 91 and Daste 92] to downsizing: preventionist, people pushers and parachute packers. *Preventionists* are characterized as trying to minimize layoffs. They are likely to be manufacturing firms and tend to downsize when there is a drop in the volume of work or orders. Tactics

include: limited firing; pay cuts; pay freezes; and job sharing.

People pushers try to push people out of surplus jobs often because of technological change. They tend to be service companies. Tactics for people pushers are: firing; early retirement; voluntary severance; and transfers.

Parachute packers are the firms that want to become lean and mean. They can be any type of company. The main reason for their downsizing is the desire to use the work-force more effectively. A common approach is the reduction of management - especially middle management. The tactic of parachute packers is frequently layoffs with extra benefits.

The Downsizing Process

The actual downsizing process varies greatly between companies and frequently within a company. The key players involved in the downsizing process are: (1) The target employee of the downsizing; (2) The management or administration of the company; (3) The human resources or personnel organization involved in the process; and (4) The surviving employees within the company. A general aspect of downsizing is that survivors tend to be ignored in the overall downsizing process - before, during and after. Better firms tend to have a documented, communicated downsizing process with extensive amounts of information available to the employees. Most firms tend to focus their efforts (extensive or not) on the target of the layoff, emphasizing training and counseling.

The Impact on the Survivor

The primary focus of this article is the survivor because of the tendency of firms to pay inadequate attention to them. How do survivors react to downsizing? One study found that 70% of downsizing survivors were afraid of losing their job. And 46% of survivors in this study felt more pressure to prove themselves within the work environment [Houston 92]. (Note that these results related to layoffs.) The survivors exhibited a variety of undesirable behaviors:

- low morale
- less productive in work output
- a higher level of management distrust
- much more cautious about taking risks
- more errors or oversights
- tend to look out for themselves more
- more infighting and politics
- more aggressive behavior
- expect and accept a lower level of quality
- feel that health, safety, etc. not important
- try for transfers to other parts of the firm
- work more overtime (with limited results)

How can a company prepare for the impact of downsizing on survivors? An important mechanism is to understand the survivor. A top level model [Brockner 86] dealing with the survivors of downsizing ties the impact of downsizing to a set of major factors: (1) The nature of the employee's work (such as stress level, satisfaction, job match); (2) The formal organization including the reporting structure, management, et cetera.; (3) The informal organization including company culture; (4) The personal characteristics of the employee; and (5) The work environment (such as industry, geography, community).

A key factor in explaining why survivors react as they do is that the survivors

often go through a *mourning process*. During this process, the survivor may experience a range of emotions [Moskal 92, Houston 92, Nowlin 88]:

Emotion	Cause of emotion
anxiety	about job insecurity
guilt	over others leaving while they stay on
sadness	over the loss of colleagues
anger	over aspects of the downsizing process
relief	over not being fired
frustration	over injustice regarding downsizing
envy	for those who have left
fear	about the uncertainty of the future

Table 1: Emotions associated with downsizing

This mourning process has to do with how people deal with change. A model that helps in understanding is a *phases of change model* [Bridges 88]: (1) With the first phase comes the shock, anger or numbness about the change; (2) The second phase is a yearning for the old ways or a search for meaning; (3) The third phase is characterized by disorganization; and (4) The fourth phase is when there is re-organization and renewal. Often the sense of loss or change associated with the second phase of yearning encompasses 6 areas [Bridges 88]: attachments, turf, structure, future, meaning and control:

Loss of	Description
attachment	friends and acquaintances are gone
turf	changes in location or responsibility
structure	chaotic organization and environment
future	expectations about work have changed
meaning	investment in job, organization suspect
control	not in control of their environment

Table 2: Losses within downsizing

How the survivor reacts to and deals with the downsizing in these phases depends on two major factors [Brockner 92]: the perception of fairness and the change in the working conditions. Detailed components of these factors are shown in the following table:

Fairness	<ul style="list-style-type: none"> • Was the layoff justified? • Was layoff congruent with culture? • Was there adequate advance notice? • Was there attention to the details? • Were reasons clearly explained? • Were cutbacks also at higher levels? • Was there a rule for who goes? • Was there support of people leaving? • Were people involved in the process?
Working conditions	<ul style="list-style-type: none"> • Will there be further layoffs? • How has my job changed? • What is my future? • How are other survivors reacting?

Table 3: Major factors in survivor response

Why do survivors react as emotionally and strongly as they do? At a conceptual level, this could be viewed in great part as coming from the change in the traditional, implied employment contract. In the minds of many employees, an entitlement tradition of employment has been implicitly assumed: *If I do my job reasonably well, I will continue to be employed*. In return for this, the employee has loyalty to the firm. This traditional assumption is fundamentally challenged and changed by downsizing. Although survivors tend not to be blatant about their responses to downsizing, there is a shift in results, approach and attitude.

VOLUNTARY SEVERANCE

"I need three volunteers. You, you and you!"
- various

Much of the focus of previous research has been on classical downsizing: layoffs. There has not been an analysis of the impact on survivors of voluntary severance programs. The key question that prompted this article (and the research study [Mikkelsen 93] behind it) is 'How do voluntary severance and layoff survivors compare?'. In the research, the behaviors of voluntary severance sur-

vivors were compared to behaviors described in previous layoff research. The comparison was based on 113 survey responses from survivors of the 1992 voluntary severance program in eight divisions of Hewlett-Packard at one geographic site.

This 1992 program was Hewlett-Packard's third offering of a Voluntary Severance Incentive (VSI). The first was in 1986 and then again in 1991. The 1992 program provided for six months' pay, plus one-half month's pay for each year of HP service to a maximum of 12 months' pay. Hewlett-Packard has been praised for its efforts in trying to balance the needs of all parties involved [Francis 92]. The stated goals of the 1986 program are a good example of Hewlett-Packard's desire and commitment to balance: (1) Consistency with Hewlett-Packard values; (2) Maximization of the ability to meet employee needs; (3) Cost effectiveness; and (4) Assurance that the actual work force demand and supply are consistent. Hewlett-Packard falls into the categories of *preventionist* and *people pusher*. The early programs and the general approach to move people within the company is characteristic of a *preventionist*. When conditions can no longer support this approach, the company moves into a *people pusher* approach.

Voluntary Severance Survivor Behaviors

The broad expectation is that the people who remain with a firm after a voluntary severance downsizing program react in most ways as the survivors of layoffs. This worked out to be true (as seen in the following table). The notation in this table of *not proven* means that no

statistically significant correlation was found.

Behavior	Layoff Survivor	Voluntary Survivor
Downsizing survivors feel most of the emotions associated with layoff programs.	yes	yes (but little guilt)
Downsizing survivors exhibit a drop in morale associated with the transition.	yes	not proven
Downsizing survivors feel stress associated with the transition.	yes	not proven
Downsizing survivors will respond to downsizing better if they perceive the job is re-structured due to downsizing.	yes	yes
Downsizing survivors will respond to downsizing better if they believe that they have a future at the firm.	yes	yes
Downsizing survivors will respond poorly to downsizing if they believe that there will be more downsizing in the future.	yes	not proven

Table 4: Survey Results

In general, these results do show that people in voluntary downsizing situations respond similarly to layoff survivors. The next several sections go into some additional detail on these areas of comparison between layoff and voluntary severance survivors.

Emotions

Layoff survivors feel disengagement emotions (anxiety, guilt, sadness, anger, relief, frustration, envy and fear). The voluntary severance research shows that there is a statistically significant correlation between the amount of downsizing in an organization and the emotions of the voluntary severance survivors. A large number (over 50%) of the respondents felt anxious, sad, relieved and frustrated. As the number of people leaving an organization increased, the levels of high emotions also increased. There were lower numbers of people

who felt anger, fear and envy. This can be seen in the following chart showing the emotion response levels from the research:

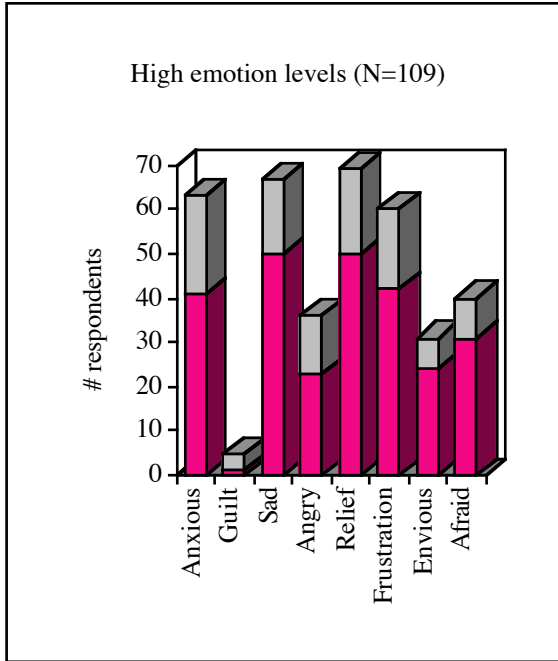


Figure 1: Voluntary Severance Emotion Responses

However, a key difference between voluntary and layoff programs has to do with the voluntary or involuntary nature of the downsizing. In a layoff program, survivors often feel guilt - even though they do not have control of the situation. The very nature of voluntary severance programs would imply that guilt does not occur, because those leaving are doing so of their own accord. The survey data did indeed show, as seen in this figure, a low level of guilt associated with the voluntary downsizing.

One of the assumptions explicitly tested in the research about survivors not feeling guilty is that the program was voluntary. Even though most survivors felt the program was voluntary, a significant number (nearly 20%) felt that it wasn't. There were a few comments

on the surveys indicating why survivors felt this way:

"I believe there WAS some pressure put on some individuals (sic) to take VSI or retirement - not only this time but the other time, also."

"Rumor had it that a number of people were 'encouraged' to take VSI."

This last comment about the rumor-mill shows the importance of open and frequent communication.

The implication of this emotion response is that management needs to be prepared for this survivor reaction. It does not matter whether the program is voluntary or not - people will go through the grieving process. In particular, it is important for management to support ceremonies or rituals. Often, ceremonies are needed for both the end of the old environment and the beginning of the new environment. A closing ceremony gives a channel for the survivors to say goodbye to friends and employees who are leaving. Although many professionals may view the ceremony with a certain disdain, it can be a very effective mechanism for letting survivors express their emotions.

Most people in the research recognized that some kind of ceremony or event for the people leaving had occurred. However, one respondent wrote on the survey:

"There was a sitewide party, but no personal parties within our dept."

Because of the number of people at a geographic site, a few large ceremonies may not be as effective as smaller department or divisional events.

Stress

Layoff survivors also exhibit an increase in stress associated with the layoff. The expectation was that voluntary severance survivors would respond similarly - but this was not the case. This was a strong expectation from previous layoff research and literature. In the research, there was no apparent relationship between downsizing and stress. There are several possible explanations for this discrepancy: voluntary severance survivors respond differently, there was some problem in the survey, other factors may mask the stress response, et cetera. In trying to understand this difference in response, there appeared to be a relatively high level of stress in the site work environment:

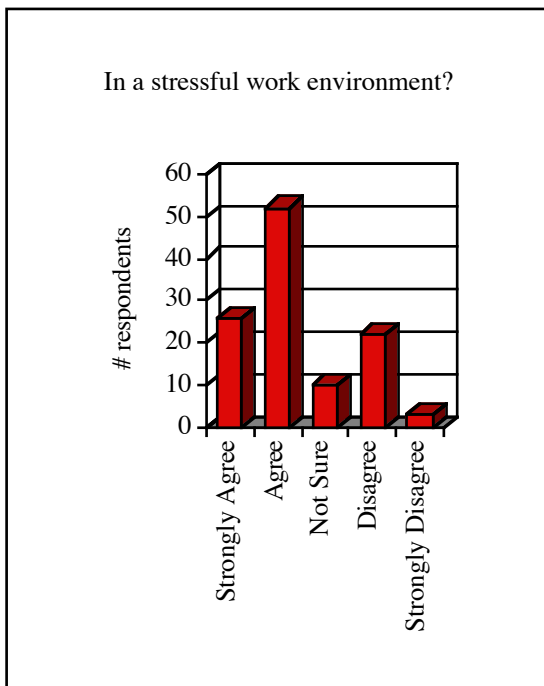


Figure 2: Stress level

The stress is caused by a variety of factors from the work environment and from the employee's personal life. This may mask some of the relationships and

effects of voluntary downsizing. As an example, one of the respondents added:

"Not so much the work but other factors."

One possibility is that there may be a general impact of downsizing in a geographic location on a survivor's stress. For example, a survivor has friends in other divisions who leave or are affected by downsizing. The voluntary downsizing elsewhere in the general geographic site could raise the survivor's stress level within an otherwise unaffected division.

There is also an interesting effect involving the offer of VSI and stress level. The original expectation was that if a survivor had been offered voluntary severance, there would be an increase in stress. This did not turn out to be true. In fact, there is an inverse correlation with personal involvement. A person who was offered VSI had a slightly lower level of stress. An explanation is that if you are offered VSI, you have a greater sense of control. The implication of this is that companies *may* be better off if they offer voluntary severance very broadly and work to retain the employees that are critical.

Job Restructuring

If an organization makes solid efforts to deal with the change of jobs, layoff survivors respond well. This is also true for voluntary severance programs as supported by correlations between job restructuring and morale. Also, as the survivor's perception of job restructuring improves then the perception of fairness and job futures improve and stress is reduced. The impact is that there are huge benefits from paying attention to the sur-

vivor's job. This attention really means recognizing that the jobs have changed and that some restructuring needs to occur to deal with these changes. The following figure shows how employees at the research site were informed about the impending job change:

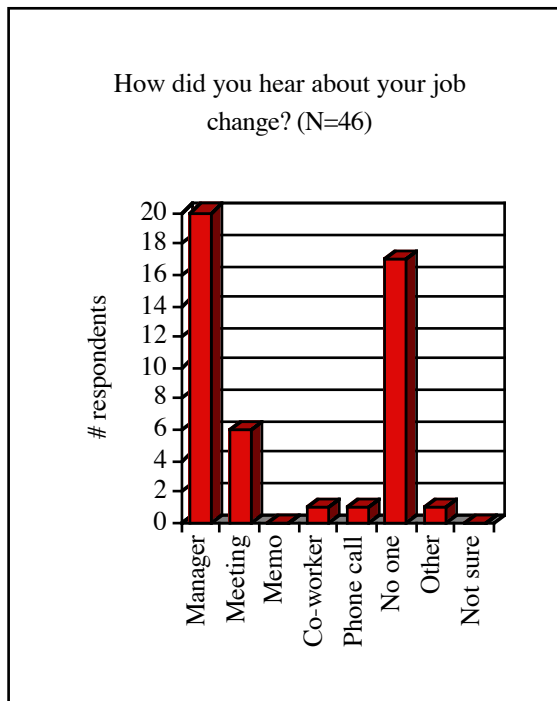


Figure 3: Mechanism used to communicate job change

Nearly two-thirds of the survivors received some attention or interaction involving a job change - which was good. However, this also shows that around one third of the survivors received no attention or interaction regarding the job change. They figured it out on their own! This indicates that a significant number of managers do not understand that voluntary severance triggers a job change for survivors. Management attention to job redefinition is necessary - and is often not occurring. The implication is that additional management training, additional management tools and downsizing process steps to insure job redefinition attention are probably warranted.

Job Futures

Layoff survivors respond differently to the layoff based on perceptions of future job expectations. If layoff survivors feel they have little future opportunities with the company, they respond less well to the layoff. Voluntary severance survivors responded identically. This is not a particularly surprising result - if you have a future with the firm, you feel better.

An interesting aspect of the research had to do, not with the comparison, but with the general sense of security that people felt. There were quite a few people who did not feel secure in their job. Common themes in the responses regarding the current work environment are:

"No job is secure!".

*"being an employee -> secure,
Having the same job - insecure".*

The last comment can be interpreted as: you can be secure in having a job, but you can't be secure in retaining your current job. This comment leads to some implications of how employees define and feel about security. Security may have to do with any of: (1) job type (doing the same function); (2) job level (being at the same pay level); (3) geographic location (being in the same part of the country); (4) product (working on the same end-product); and (5) organization (being in the same division). How a survivor reacts to downsizing depends on their personal perception of what 'secure' means. A manager needs to think about how the changes will be viewed in light of the individuals perceptions.

Selection Criteria

A basic difference between layoffs and voluntary severance had to do with the selection criteria. In a layoff, management makes this selection. In voluntary downsizing, the individual employee decides whether or not to leave. In a layoff, there is a poor reaction by survivors if they feel the selection criteria for layoffs is unfair. There is no direct corollary in a voluntary downsizing program, because the people who leave make the choice. However, in voluntary downsizing, the company does make a choice about who is offered voluntary severance. And in fact, voluntary severance survivors respond poorly if the criteria for who is offered voluntary severance is perceived as unfair.

This area of fairness generated a great number of comments from the respondents. There is a lot of emotion concerning who was and was not offered VSI. Some of the comments are:

"Not fair in '92. Was more fair in '91. Individual departments did not blow their caps for their own security. This was not good overall ... Also, why were ... programmers and engineers, as well as many managers not elegable (sic)? This makes the 'common worker' or those on lower pay scales feel not as important, or valuable. i.e. 'special' people weren't protected. If VSI is offered, it should be offered across the board."

"My anger about the VSI program related to the very low cap in my group and the very short time I had to decide between VSI and a new position in HP ..."

The "caps" refer to the limited number of voluntary severance openings in

several of the participating divisions. Part of the emotion comes from some divisions "blowing" (i.e. removing) these limits while other divisions kept the limits. This was often seen as unfair. The removal of limits was generally left to the discretion of the division general manager. Based on the previous layoff research, a few key problems are illustrated here: (1) A lack of clear communication about the downsizing process; and (2) Different approaches used in different divisions. The divisions may be in different businesses and may have different needs, but these differences must be clearly communicated.

The implications of this are fairly clear. First, management needs to be very clear about the goals for downsizing and to match the criteria to the goals. Second, management needs to be very proactive about communication regarding the goals. Third, this communication needs to include and be much clearer about the selection criteria and process.

DOWNSIZING EFFECTIVENESS

"Each adventurous genius will still leap at the arduous prize, and find himself stimulated, rather than discouraged, by the failures of his predecessors."

- David Hume, ... Concerning Human Understanding

Out of a survey [Tomasko 92] of 1000 firms who instituted downsizing, there were a variety of original goals expressed by the firms as shown in the following table:

goal	success
90% wanted reduced expenses	< 50%
75% wanted improved productivity	22%
>50% wanted improved financial results	< 25%
over 50% wanted to reduce bureaucracy	15%

Table 5: Downsizing goals and results

The general sense from these results is that downsizing is not terribly effective. In this study, only 191 firms felt that they improved their competitive position by downsizing. Almost 800 of the firms in this study had to replace some laid-off employees, and 25% of the firms had to replace 10% or more.

In another survey [Brockner 92] of 1005 firms, 86% of the firms had downsized in the previous 5 years. Out of those that had downsized, only 42% had eliminated work. As a result, employees worked more overtime. Many functions moved to external (and higher priced) contractors. Although the information is anecdotal, the sense is that there can be a second wave of losing employees after the downsizing. This second wave leaves because of work-load, general stress, fear, et cetera.

These previous studies had used classical downsizing - layoffs. In the research on voluntary severance, the sense of the effectiveness is similar (although this was not the area researched). This can be seen in several comments from the study:

"My biggest concern is that we have already hired back our two VSI folks as consultants, to do work anyone in the lab would love to have done."

"I feel VSI money was wasted ... with ... engineering positions. Many people signed up for VSI and the cap was reached. Now the division is interviewing for people to fill the same/similar positions. This was a lack of proper planning."

"Lost quite a few good people who didn't get VSI but left anyway."

Improving the Effectiveness of Downsizing

This information does not indicate that downsizing (layoffs or voluntary severance) is a particularly effective vehicle. However, it can be. It is important to note that many of the firms did achieve some improvements. The sense of the previous work is that most firms don't pay attention to the basics of downsizing or to a clear definition of goals of downsizing. These errors are unfortunate since much of the literature has focused on how to be more successful during a downsizing process. The recommendations from previous literature dealt primarily with people management, communication, involvement and the overall process.

Downsizing process: Based on previous experiences, it is a mistake to link downsizing selection criteria with employee job performance. The new jobs should be clearly defined and well understood by the employees. Because of the reactions of employees, it is important to prepare supervisors for downsizing, particularly for dealing with survivors and their reactions to the layoff. One of the keys to being effective is in recognizing that the downsizing is a classic transition. The key factors that management should pay attention to include: communication, leadership, training, incentives and rituals (of transition and beginnings).

Communication: It has been shown that extensive downward communication in an organization helps a great deal during a downsizing program. The communication should be very open and honest - full disclosure of information builds trust. Because downsizing causes

stresses between employees and management, management should be approachable and available to discuss the process and its implications. Since the reason for downsizing is to change the organization, it is very important to communicate the intended improved business performance vision so that the employees can buy in to this vision. In terms of involvement and communication, one model of communication [Miller 92] lists the following levels: (1) No communication between employee and supervisor; (2) One-way communication from management to the employee; (3) Two-way communication between management and employee where management listens to the comments from the employee; and (4) Participative communication and involvement where the employee is involved with the process. The implication is that the more interactive the communication and the more involved the employees are, the better their response.

People management: Managers need to recognize the grieving process. It is important that employees feel that they can mourn and work through their emotions. A layoff often triggers top performers in the organization to start looking for different jobs. It is important to talk to the 'stars' that are left in an organization in order to retain as many as possible. For top performers and the rest of the survivors, it is very important to develop a career plan so that they understand they have a future with the company. Morale will be low and will need to be rebuilt.

Involvement: Jobs change due to downsizing. The survivors will respond better if they are involved in restructuring their jobs and the environment.

CONCLUSIONS

There are many studies of layoffs which have shown that the layoff is a transition - specifically a disengagement - for both the targeted employee and the surviving employee. The research discussed here has shown that people left in a company after a voluntary severance program react in many ways as survivors of layoffs.

Managers involved in downsizing should recognize that even a voluntary program causes the survivors to deal with change and transition. This is not a condemnation of voluntary severance programs. Voluntary programs have been and continue to be useful mechanisms to deal with the changing business environment.

In order to effectively deal with downsizing, an organization should realize that: (1) Voluntary severance and layoffs have a very similar effect on the survivors; (2) Organizations must clearly define the goals of the downsizing; (3) Management must adequately plan ahead for the intended change; (4) There must be good communication to and with the employee; (5) Managers need adequate training, tools and support to deal with the issues; (6) The overall process should be done in a timely fashion; and (7) Much more attention needs to be paid to the transition aspects of downsizing as part of the continuous transformation of people and organizations.

As painful as downsizing can be, it can also be a powerful change agent. Many times, the organization is focused on various of the financial or structural

changes of the downsizing. And so, one of the opportunities often lost in downsizing is to use the transition to effect positive changes in the employees' behavior. Most people and organizations do not change easily. A downsizing event can be a useful catalyst for change, but only if it is considered as part of the broad downsizing goals and plans.

One of the worst things that can happen in a downsizing situation is to repeat the errors of others who have gone before. This should not happen because enough downsizing has occurred and enough has been studied and written. This article is a brief introduction, and should help, but it is just a start. If you are currently in the process or are considering downsizing, make the effort to look at previous experiences. They can help tremendously.

It is hoped that this article has provided some useful insights into downsizing and especially its survivors. However, it is difficult for most organizations, managers and employees to deal effectively with downsizing. Even when familiar with the effects, most people will still respond as described. (I explicitly point this out because of personal experience. Even after extensive research in survivor effects, I saw that my reactions after a recent downsizing followed many of the classic survivor behaviors.)

"The face of the country seemed already changed; the survivors began to come forth to reckon up their numbers, and mutually to exchange condolences and congratulations. There was already a talk of resuming business again; ..."

- Alessandro Manzoni, *The Betrothed*

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