

# **Review of Faculty Retirement Literature**

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## **Review of Faculty Retirement Literature**

The faculty retirement literature includes both institutional and individual perspectives of topics such as finances, preparation for retirement, retirement trends, and retirement policies. Studies come from disciplinary traditions ranging from economics to gerontology, sociology, social work, and psychology. Much of the faculty retirement literature from the decades immediately before and after the elimination of mandatory retirement (1984-2004) focuses on trends in retirement rates, whether predicting or assessing changes in faculty rates of retirement or evaluating the effectiveness of retirement incentive policies. Other key themes include: the implications of retirement trends – ranging from faculty shortages after high faculty turnover resulting from various “buy-out” retirement incentive options to the inability to hire new faculty because no faculty retire; how faculty in various disciplinary or institutional settings prepare financially for retirement; and, the factors influencing faculty members’ decisions to retire. Considerable attention was devoted to solving the mystery of faculty retirement in an era without compulsory retirement: How can institutions encourage low-producing faculty to retire without losing high-producing faculty? Much of the research since 2004 has continued to focus on the transactional issues of faculty retirement (e.g., finances, phasing, benefits), instead of on the richness of culminating accomplishments and how institutions and retiring faculty both benefit through effective policies and programs for latter career faculty.

### **Faculty Retirement Trends**

Many of the studies on faculty retirement trends focus on potential challenges from an institutional perspective and the implications of the elimination of mandatory retirement for an institution’s ability to manage its faculty composition. These included explorations and predictions of faculty retirement rates with and without compulsory retirement [1-23]. Some scholars predicted that, without compulsory retirement, faculty would wait to retire and, therefore, would be considerably older when they chose to retire than they would have been under mandatory retirement policies [8, 9]. However, others predicted changes would vary by

the retirement policies available and institutional type [11], and some found that any changes would not be significant [6, 15, 24-26].

Some scholars questioned the validity of faculty retirement predictions and explored the methodological challenges in predicting faculty retirement trends post-mandatory retirement [10, 12, 13]. Some studies of faculty retirement trends have been within single disciplines or fields, such as marketing [27, 28], nursing [29-32], and academic librarians [33]. Others have been restricted to institutional types, such as community colleges [34-38].

### **Managing Faculty Composition**

Various studies have explored what institutions are doing to manage their faculty compositions without rules for mandatory retirement [1, 2, 4, 7, 22, 23, 39-42], including institutional approaches to encouraging faculty retirement so that institutions may “renew” their tenured faculty [21, 40, 43]. Scholars have explored the impact of various retirement incentives on faculty retirement rates [1, 12, 41, 44-48]. For example, Kim [49] evaluated the UC Voluntary Early Retirement Incentive Programs (VERIPS), determining that the programs successfully reduced the “funding gap” between available resources and salary obligations, but that academic program quality may have been negatively affected by the sudden loss of senior faculty. Scholars have studied the prevalence of different retirement options and incentive programs in higher education [1, 21, 50], finding that many institutions are attempting to manage faculty retirement through policies and incentives and the number of institutions with phased retirement options is growing.

In addition to studies on how institutions seek to encourage faculty retirement, scholars have studied how institutions work to retain their aging faculty [21, 30, 31, 37, 40, 43, 50]. Some focused on the implications of a large proportion of faculty suddenly “turning over” as a result of retirement [4, 34, 36-38, 51-53], while others were concerned with the implications to higher education of replacing large numbers of retiring tenure-line faculty with off-line faculty [21, 51, 54, 55]. In fields such as nursing that predict faculty labor shortages as a result of high faculty

retirement, scholars have explored using retired nursing faculty as a potential labor force [29]. Further, as institutions find new ways to utilize their retired faculty, scholars are exploring these institutional efforts, such as using retired faculty to teach or fulfill institutional needs [29, 56]. Some attention has also been given to the experiences of retired professionals (i.e., from non-academic positions) as they transitioned into the academy as a second or third career [57].

### **Implications of an “Aging” Faculty**

Several faculty retirement studies focused on the implications of an aging faculty in terms of the ability to meet institutional needs [43, 58-62], the particular needs of older faculty and how institutions can meet these needs [63], and the impacts of aging on faculty interactions with students and colleagues and faculty performance of duties [58]. Gappa, Austin, and Trice’s [64] *Rethinking Faculty Work* offers insights into senior faculty needs, noting that “many senior faculty members ... want to adjust the level of their involvement in work while continuing some level of professional affiliation” [64]. Studies have also explored the societal and financial implications of a disproportionately “older” population that is living in the “retirement period” longer than preceding generations did [65-70]. Further, the rising costs to the institution of medical insurance for the growing proportion of older active and retired faculty also has been addressed [21, 71-74], and the case made for state-supported coverage for retirees [75]. Some scholars have explored employer “ambivalence” with regard to older workers and recommended interventions such as periodic performance appraisals, postretirement employment, and other strategies for re-engaging older faculty members [30, 67, 69, 76-80].

### **Faculty Retirement Policies and Programs**

Various studies have covered the need for new kinds of retirement policies to meet the new needs of faculty [4, 23, 39, 81]. Scholars have studied the prevalence of various retirement programs in higher education [1, 46, 82] and outside of higher education [83, 84]. Others have assessed the effectiveness of faculty retirement programs [85-87] and faculty desires for these

programs [4]. The literature also includes the growing prevalence of faculty retirement offices [88-90] and policies that cover postretirement for faculty [81, 91].

Within the literature about retirement policies and programs, the majority focuses on phased retirement. Many scholars have explored phased retirement programs for faculty [21, 34, 39, 46, 82, 92-98] and for employees outside of the academy [83, 84, 99-102]. Excellent definitions and examples of phased retirement options are provided by some of the scholars or organizations involved in faculty work-life issues [82, 96, 98, 103-105]. Scholars have examined faculty utilization of phased retirement options [22, 82, 92, 93, 95-97, 106] and the development and implementation of these options by institutions, providing tips for institutions developing similar policies [21, 23, 46, 82, 92]. Some have explored the impact of phased retirement options on faculty retirement trends [82, 92, 96] and on retirees' pensions [98, 101]. Several scholars of phased retirement options for faculty have focused on the intersection of institutional and individual needs [22, 23, 39, 42, 92, 106], finding phased retirement to benefit both individuals and their institutions.

### **Retirement Planning by Faculty**

The faculty retirement literature contains several pieces related to the awareness and perceptions of retirement plans by faculty, in general [4, 42, 107, 108], among marketing faculty [28] and community college faculty [35], and compared to employees outside of academe [109]. There are also discussions of resources for faculty as they plan for retirement [110]. Faculty nearing retirement tend to be concerned about maintaining their health insurance, library privileges, office space, emeriti status, and part-time teaching opportunities postretirement [81]. Studies indicate that access to planning tools and information facilitates the retirement planning process [111], but many faculty do not feel their institutions provided them adequate access to such planning resources [112, 113].

## **Retirement Intentions of Faculty**

Research on faculty intentions to retire have largely focused on the predicted retirement patterns for faculty [4, 31, 32, 42, 62, 81, 114-116]. Other scholars have explored which faculty want to retire “early” and why [44, 117]. Studies have found that faculty are choosing not to retire in order to keep medical insurance [72, 73] or to finish what they came to do [4]. Other scholars found differences in faculty intentions to retire by discipline and institutional type [115, 118], and by gender [119]. Both the role of spouse in retirement decisions [120] and the role of health [121, 122] were explored in faculty retirement intentions. Ferren [4] found that “finishing what they set out to do” had “holding power” over faculty who were eligible to retire [4]. Her study concluded that the idea of a culminating legacy is important to many faculty members and institutions that support faculty in fulfilling these legacies will be the most effective in satisfying senior faculty who are dedicated to fulfilling the institution’s mission both before *and after* they retire.

## **Satisfaction and Vitality of Senior Faculty and the Decision to Retire**

Scholars have explored the satisfaction and vitality of faculty who stay beyond the “traditional retirement” age [123, 124]. Some have explored differences in faculty satisfaction and productivity by faculty career stage/age [4, 60, 77, 79, 125, 126], by retired or active status [127], and by gender [125]. Others have addressed the role of faculty dissatisfaction [79, 128] and of productivity [49, 60] in faculty retirement decisions. In a study of faculty aged 50 or older, Berberet et al. [81] found that women and minority faculty indicated higher levels of job-related stress and of feeling unappreciated and under-utilized by their institutions than did their white male counterparts. Leslie [106] found in a study of faculty actively phasing into retirement that the decision to retire can be influenced by fatigue, burnout, financial distress, and disinterest in research and in the need to acquire new technological and teaching methodologies. Similarly, one faculty member in another study [4] indicated, “Instead of reinventing myself, I’ve decided to leave. I’ve already re-created myself several times” [4].

## **Retirement Transition Theories**

Retiring from a career represents a major life adjustment. Experts from the field of counseling indicate that “because career roles are associated with status, identity, power, and money, this transition could be seen as a potential period of crisis” that could be as “devastating to the older individual as job loss at any time in life” [129]. Even though faculty may now choose when to retire, rather than having to retire at or before a mandated age, the retirement transition still represents a major adjustment for faculty. Existing retirement transition theories may not apply to all retirees because they “were developed based on White, middle-class male norms” [129]. That said, the theories would be applicable to the majority of retiring faculty and offer an excellent starting point in understanding the needs of all faculty retiring in the next decade.

LaBauve and Robinson [129] describe a three phase theoretical framework for faculty retirement transitions: *preretirement* – the “preparation and planning stage,” which is typically within five years of retirement but can start earlier; *retirement* – from within six months of retirement to six months after retirement and represents the “action stage;” and, *postretirement* – the “maintenance stage” from a counseling perspective [129]. Faculty in each of the phases require specific kinds of support and information to facilitate the transition.

Goodman and Pappas [113] applied the Schlossberg 4S Transition Model [130] to interpret faculty experiences with the retirement transition. The 4S model posits that individuals cope with transitions based on evaluation of their unique situation (*situation* category), their personal qualities (*self* category), the support available (*support* category), and the strategies used to plan the transition (*strategies* category). They found the model to be useful for examining the “personal and social dimensions of the retirement transition” for faculty [113].

## **Retirement Transition Experiences**

Several studies explored faculty experiences with the retirement transition, both before and after the elimination of mandatory retirement [56, 106, 107, 113, 121, 122, 131-137].

Literature on faculty retirement transitions include examples of good institutional responses to

assisting with the transition [1, 22, 113], including some interesting models such as retirement celebrations [138], as well as examples of ways in which institutions poorly responded to this transition for faculty [136].

Ferren [4] found that late career faculty desired institutional support to finish final projects before they retired, as well as alternatives to full retirement. She quotes one faculty member as saying, “The best thing the university could do is treat us differently. Reduce our teaching loads and say, ‘Write guys.’ It would be nice to see some kind of program for senior faculty who have active research plans to reduce their teaching loads and service and let them write” [4]. She also found that almost a third of the faculty she interviewed felt that they were energized by their engagements with the campus and worried that they “would not be able to continue some of their interests if they left” [4].

Many faculty want to “cut back” initially before retiring fully [4]. Numerous institutions have been able to accommodate this desire with various retirement policies and programs. As discussed above, phased retirement programs are both popular and successful in assisting faculty to transition from employment to retirement [92, 95]. Leslie and Janson [95] also suggest that phased retirement can revitalize faculty interest in research or service, to the benefit of the institution. However, some laws around state defined benefit plans make it difficult to develop or implement phased retirement programs [98].

### **Postretirement Activities, Satisfaction, and Needs**

For faculty in the “maintenance stage” of postretirement, “the days may be long and empty” without opportunities to remain engaged with the academic community [139]. Several studies and personal narratives identified the challenges and advantages of retirement [5, 88, 107, 112, 113, 121, 132, 137]. Aside from financial security and health concerns, the greatest needs of retired faculty are “acceptance and recognition and the opportunity to exercise skills, intellect, and social commitments for positive accomplishments” [88]. To best meet the needs of retiring individuals, institutions will need to move beyond finding ways for faculty to feel secure

about their finances and health coverage, and work to help faculty find outlets through which to continue their “positive accomplishments.” Fortunately, many of the ways through which faculty may continue these efforts are beneficial to their institutions.

Studies have explored faculty experiences postretirement, finding differences by gender [56] and by institutional type [56, 107]. Firmin and Craycraft [112] found that preretirement planning was crucial to faculty satisfaction in retirement and that retired faculty with active social connections and opportunities for involvement with their institution expressed the most satisfaction. These studies suggest that beyond finding ways for faculty to feel secure about their finances and health coverage, working to help faculty continue their “positive accomplishments” is of lasting benefit to institutions. Walz et al. [56] surveyed retired social work faculty and identified some gender differences, namely that women were more likely than men to have retired before age 62 and men were more likely than women to cite failing health as a reason for retirement. They also found that faculty who retired from public institutions tended to do so at younger ages than faculty at private institutions and faculty tended to work for longer periods of time before retirement at private institutions than public institutions [56].

Auerbach [88] highlighted negative experiences retired faculty may have on campus, noting that some retired faculty “are made to feel like guests – nice to have you around but don’t stay too long” (p. 22). Dorfman and Kolarik [140] found that 70% of retired faculty continued their professional activities. Chase et al. [132] explored the emotional reactions of faculty to retirement, surveying all faculty retirees at Indiana University from 1995-1999 (87 of 153 responded) and interviewing a subset of 33 retired faculty. They found that almost 40% of retirees indicated feeling some “detachment from their previous world” [132], adding that a smooth transition into retirement contributes to faculty satisfaction postretirement. They also found that retired faculty who continued to be active with their institutions, at least part-time, experienced fewer life changes and therefore less stress than faculty who did not remain active at all with their institutions [132]. Despite finding that many faculty looked forward to retirement,

they concluded that “a significant subset of retirees indeed wrestled with emotional reactions to the change of life events” [132].

### **Intersections between Institutional and Individual Needs**

In an overview of phased retirement for faculty and the kinds of factors institutions should consider in developing and managing phased retirement programs, Allen et al. [94] detail the benefits to both the institution and faculty members of the program adopted at the University of North Carolina (UNC). They found that the phased retirement program at UNC was effective in increasing the rate of retirement among faculty members aged 60-64 and that it was primarily the faculty “jaded with academic life” who availed themselves of the option – not the productive faculty institutions tend to desire keeping [94]. They discuss both potential increases and decreases in costs related to having faculty phasing into retirement and the “overwhelmingly favorable effects for UNC faculty” associated with maintaining a high portion of one’s salary while decreasing work obligations [94]. While noting that there is “the less tangible benefit of being able to make a gradual transition,” they do not focus on this aspect of phased retirement for faculty in their study [94]. In addition to policies regulating when and how faculty retire and how they may continue to engage with their institutions, emeriti faculty offices have been promoted as a means for “mobilizing and encouraging retirees to continue their service to the institution and the community” [88].

Clearly, work has been done on the areas of what institutions and individuals need regarding faculty retirement, but it is time to move these efforts away from institution or state specific studies and toward a bigger picture view of what will best serve American higher education in the coming decades. Sugar et al. [23] recommend the collection of national and institutional level data, which would allow the development of “innovative policies and programs in institutions of higher education to fit both the professional and personal needs and desires of faculty as they age, as well as the institutions’ best interests” [23].

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