

Schools and their faculty retirees: The potential for mutual goodwill

Abstract

Both faculty retirees and their institutions potentially stand to benefit from ongoing, productive connections. But is such mutual benefit realized in practice? Most research on retirement related to higher education focuses on financial and demographic aspects, on decision-making, and on individual retirees' experience in the postretirement period. However, there is less information—or a lack thereof—about the relationships that retirees have with their institutions. This paper brings forward findings from two surveys: one of U.S. institutions of higher education (IHEs) and the other a case study of one university's retirees. From the first survey, we report that IHEs' regular contact and follow-up with retirees is rare (Poggio et al., 2023). From the case study, we report retired professors' expressed desire for increased ties with their institutions and recognition for their contributions. Both contain eye-opening insights that merit attention.

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Introduction

Reluctant to retire

Career-long employment in academia falls into the category of “good jobs”—that is, positions that pay relatively high earnings, provide opportunities for advancement and adequate fringe benefits, and permit some worker control over scheduling and termination of the job (Kalleberg, 2011). Senior faculty well realize this and tend to view their work as not only worthwhile but genuinely enjoyable. At the same time, retirement risks removing this major outlet for creativity and engagement. One’s future identity and self-worth can loom as a prominent concern for faculty who contemplate retiring (Chase et al., 2003).

Desirable qualities of the faculty job include social interactions with students in and out of the classroom, work with departmental colleagues, and attendance at scientific and scholarly conferences. There are opportunities to work with knowledgeable, passionate and like-minded people while mentoring students and conducting research (Cahill et al., 2018; Yakoboski et al., 2023). Retirement-age faculty benefit from their organizational seniority because it allows them to choose their roles, responsibilities and tasks more carefully within their departments (Winston & Barnes, 2007). These are congenial circumstances that many faculty members are reluctant to leave. It can be daunting to have to reinvent oneself after retiring from a position of recognized expertise in a field and from membership in a community in which one is respected and seen as essential (Emerald & Carpenter, 2014; Miron et al., 2022; Onyura et al., 2015).

Pleased to engage

Reluctance aside, faculty members do withdraw from employment, weighing considerations about their finances, working conditions, leisure preferences, family commitments, and their levels of enthusiasm, patience, and energy for the job (Beidler & Van Vliet, 2008; Cahill et al., 2019). Yet even after formal separation there can be a continuing desire to educate, mentor, and conduct research (Dorfman & Kolarik, 2005; Thody, 2011). To be sure, some academics walk out the door and never look back. However, former faculty members who do wish to maintain their relationship to higher education say they’d like to do so within college and university systems, both socially and intellectually (Baldwin et al., 2018). One reliable sign of goodwill toward the school is the willingness of retired faculty to support it financially.

Professors, even if not reemployed elsewhere, can nevertheless maintain their professional interests and involvement in their specialty fields. To encourage continued affiliation with the profession, scholarly societies often offer discounted conference fees and membership dues to retirees.

In this way, engagement in a profession and a familiar school community intersect when the former occurs in the context of the latter. This aspiration to straddle retirement and academia was revealed in a study with a sizeable faculty sample (Yakoboski & Fuesting, 2021). About one-third of senior faculty who were employed full time stated they were highly likely to have selected a phased retirement plan if the option had been available at their institutions (Yakoboski & Fuesting, 2021).

Recent career shocks

Institutional attentiveness to retirees can reinforce positive sentiments; it may also help remediate possible estrangement that occurs in the transition from work to retirement. Employment circumstances such as institutional budget cuts, leadership changes, and shifts in departmental culture and priorities can contribute to involuntary retirement (Mitchell et al., 2017). Faculty instruction is the largest expense for both public and private institutions, according to a CUPA-HR study (Li et al., 2019). In the wake of the 2008 recession, many universities reduced the size of their departments to save money, according to the same report. With smaller departments and a greater workload came more stress and additional reason to retire.

A more recent shock for pre-retirees arrived in 2020. The COVID-19 pandemic burdened older faculty who lacked the time and energy to transition from in-person to online instruction (Cutri et al., 2020). In addition, normal transition procedures and rituals (administrative guidance about navigating retirement benefits and exit steps, knowledge transfer to successors, and recognition ceremonies) were cut short or even foregone during periods when colleges and universities were in virtual mode. Student and collegial interaction fell away; parking lots were empty. Thus, ties to the former campus may need some repair.

Maintaining connection

Institutions should not overlook a dedicated and highly qualified pool of professionals who are eager to work and make a contribution. Schools can benefit from the disciplinary and institutional knowledge that retirees can share. Retirees can provide schools with access to networks of government, industrial and other experts they’ve collaborated with over the years. Retirees can be recruited to participate in campus research endeavors. Retirees can mentor graduate students and current faculty. Retired faculty are eager to share their experiences with alumni, parents, colleagues, and other universities (Baldwin et al., 2018; Chase et al., 2003). Campus-based retiree organizations at selected institutions have seen success in channeling retirees’ desire for affiliation (Brown & Jones, 2018). Schools should also give careful thought to services that

can be rendered beyond the institution’s usual geographic boundaries. Wherever they reside and in whatever circles they are known, retired faculty can multiply positive reputations for their schools.

The advantages to be gained from cultivating ties flow both ways. Schools can provide faculty with meaningful recognition for their contributions—past, present and to come. For those still active in scholarship and publishing, colleges and universities can offer continued access to research facilities, libraries, labs, software and general services. Most importantly, active outreach and signs of consideration and respect can assure retirees that they can look back on careers that mattered and still do.

In the pages ahead, we report that a scarcity of colleges and universities regularly check in with their retirees, but that these same schools are interested nonetheless in methods for maintaining ties. We also report how one school’s retired faculty maintain a solid sense of attachment to the institution and express a willingness to give time and expertise for its benefit.

Study 1: U.S. institutions of higher education

Our research at the University of Kansas (KU) arose from a governance committee charged with promoting communication with retirees and improving their experience as a way of acknowledging their valued service and validating their importance as assets of the university. The committee had previously canvassed KU retirees in 2008 and 2019 and prepared to do so again in the wake of the COVID-19 pandemic. Seeking model questions for the new effort, in 2022 we fielded a brief, five-item survey to all four-year-and-above institutions of higher education (IHEs) in the United States. What, we asked, does your institution do to initiate and maintain contact with your retirees?

Of the 685 institutions contacted, 274 responded after three reminders for a 40% return rate. This exceeds the typical survey return rates (20% to 30% at best) experienced by social science investigators. Replies did not yield model surveys for us to use but nonetheless generated two surprising findings. First, schools’ contact with retirees is not common (see Chart 1).

CHART 1. INSTITUTIONAL ENGAGEMENT OF RETIREES

			Total
Within the first year after retirement, does your institution survey or interview retirees (faculty and staff) regarding their opinions, feelings about, sentiments, and attitudes as they approached and as they began their retirement?	3%: Yes, annually	11%: Yes, but not with regularity	14%
Does your institution survey or interview all or a sample of retirees (faculty and staff) periodically post-retirement... as to their ideas, thoughts, desires, preferences, and reflections on retirement?	2%: Yes	7%: Yes, but not systematically/regularly/periodically	9%

Note: N = 274.

From the institutional response data we gathered, only 14% of the IHEs reported at least some irregular formal contact with retirees early in their retirement, and only 9% of the IHEs acknowledged following up, even if only irregularly. Schools reported such contact efforts via exit interviews or the sponsorship of a campus-based retiree organization.

Second, when we offered to share our findings with participating schools, 80% indicated a desire to receive our report—a welcome signal to us that IHEs want to know what other institutions may be doing in this regard. Although schools didn't often reach out to their retirees, it seems many would consider doing so.

Study 2: Retirees at the University of Kansas

The online survey of KU's retirees took place in 2023 to explore the immediate and longer-term experience of former faculty and staff members. The committee saw this moment as an opportunity to understand the retirees' preferences and perceptions at a time when the recent COVID-19 pandemic caused unplanned separations and disrupted ongoing contact with departments and units. This check-in with retirees could also serve as a baseline for regular, periodic resurveys in the future.

To set the context, KU has two main campuses: the broad undergraduate and graduate education service campus (in Lawrence), and a health science and Medical Center campus (in Kansas City). For many decades KU has shared a phased retirement option for faculty with up to three years of gradual, part-time (50% annual maximum) separation from the university. Twice in the recent past (2008 and 2019), the university offered retirement-age faculty a buyout option as state budget cuts put pressure on the university. The institution has had a faculty and staff retiree organization since the mid-1980s, but it isn't well known and has a relatively small membership. Finally, in the recent past and currently, the retirement plan for employees is a mix of defined-benefit and defined-contribution types, the latter requiring more decision-making upon retirement.

Study 2: Methodology

We devised and pilot tested an online survey instrument of approximately 30 forced-choice items along with provisions for open-ended responses. Some of these questions were experimental, and some were specific to our university context, but we also intended that certain, general lines of inquiry could be adopted by other IHEs for their own

purposes. (Copies of the survey are available on request to the first author.)

We next identified retired respondents for the online survey, and therein lies a tale. When estimated between our two main campuses, 3,300 persons was the likely total number of living retirees in 2023, three-quarters of whom had been employed on the Lawrence campus. We planned to survey them by means of their KU email addresses, presumably available through each campus's human resources (HR) unit. However, we discovered that email address policies differ between the two campuses. Lawrence campus retirees may keep their KU email addresses, but Medical Center retirees are required to forfeit their email addresses immediately upon retirement. There may be good reasons for this institutional policy, but it forecloses a ready means of communication with retirees. Because most Medical Center retirees had no known documented email address, the survey's target population was narrowed. Further, when we distributed the surveys electronically, nearly 400 bounced back as undeliverable to the addressee. This unavailability of current email addresses may help explain why other IHEs are out of touch with their former employees. Reaching out is just not straightforward.

Using the email addresses that were available, we sent the survey to 2,255 identified KU retirees. After two follow-up mailouts over a six-week period (March–May of 2023), we obtained a return of 899 usable surveys from retired faculty and professional staff, a 40% return rate. Among former faculty alone, we received usable returns from 323 (47%) of the 685 members of the potential pool of faculty respondents. In the findings that follow, we focus on faculty retirees only.

Study 2: Results

The survey featured questions of four kinds: ties and sentiment, satisfaction with the retirement process, interest in assisting the university, and open-ended comment fields. Respondents were assured of anonymity. A full appreciation of the responses would require analytic comparisons across individual characteristics, such as gender, length of time retired, whether retirement began during the pandemic, residential proximity to campus, and former department or campus. For the present purpose, the all-sample responses on selected items (Chart 2) illustrate what can be learned from a survey of this sort, though we caution that survey findings from a single school can't generalize across the full landscape of American higher education.

CHART 2. SURVEY RESPONSES BY KU FACULTY RETIREES

Ties and sentiment	
In retirement, KU has remained important to me.	84% agree
I have a continuing relationship with my friends and associates at KU.	79% agree
The university and my former department/unit make me feel appreciated, valued, and remembered as a retiree.	47% agree
My former department/unit makes me feel like I still have something to contribute.	37% agree
I receive information about relevant events from my former department/unit.	59% agree
Would you like more regular contact from and with KU?	29%: Yes, definitely 54%: Perhaps
Satisfaction with the retirement process	
Your experience with KU Human Resources (HR) during the retirement process.	79%: Satisfied or very satisfied
Help with your transition from KU health insurance to private insurance or Medicare.	68%: Satisfied or very satisfied
KU's help with your financial planning for retirement.	35%: Satisfied or very satisfied

Note: N = 323.

Ties and sentiment

Responses on the first two items in Chart 2 are heartening. Replies indicate a high level of agreement about the personal importance of the university (84%) and agreement that ties with KU friends and associates remain intact (79%). When asked how they feel regarded by the university or former department, 47% agreed that they feel appreciated, but even fewer—37%—agreed that the department “makes me feel like I still have something to contribute.” This suggests some attenuation of sentiment with the school and even more so with the department. Nonetheless, 59% feel informed about departmental events, so there is a measure of communication.

The final item in this set affirms our case for maintaining ties with faculty retirees. We asked: Would you like more regular contact from and with KU? *Yes, definitely* was the response of 29% who returned surveys, and another 54% selected *Perhaps*. Altogether then, 83% of these faculty retirees indicated openness to more regular contact.

Satisfaction with the retirement process

Separation from employment entails a flow of paperwork and information about retirement rights and benefits. In the KU case, faculty employees are offered retirement planning seminars. This is all the responsibility of the HR office. Survey responses (Chart 2) were quite complimentary about HR's efforts—79% satisfied or better. In the comment fields, dozens of retirees reported having been well prepared and

informed. HR staff members were appreciated for being knowledgeable, responsive and “terrifically helpful” regarding retirement benefits. “I can't say enough good things about the HR department.” On specific topics covered by the survey, advice on health insurance was satisfactory to 68% of respondents, but help with financial planning was only half as satisfactory at 35%. We return to this topic when exploring the open-ended comments below.

Interest in assisting the university

Among retired faculty, is there latent potential for service to the university? A set of 12 questions asked about respondents' “desired involvement” in hypothetical efforts to serve retirees and near retirees, efforts such as maintaining contacts or assisting in planning seminars. Specific findings here are mostly of intramural interest to KU, but there are consistent patterns to note. For a proposed activity, respondents could answer: *Yes, definitely*; *Perhaps*; or *No*. For most proposed activities, the percentage of *yes* respondents did not rise above single digits. However, after combining that with the *perhaps* answer, most activities attracted 30% to 40% of retirees who were at least open to considering such opportunities. They were most open to workshops for retirees (59%) and to clubs and educational groups (54%); notably, 39% said *yes* or *perhaps* to the prospect of raising funds for student scholarships. Such responses could be a prompt to line up initiatives to absorb this goodwill.

Open-ended comments: In their own words

The survey concluded with two optional, open-ended topics (things I wish I had known when I retired; things the university/school could have done to be more helpful) and a generic open-ended question (Is there anything else that has not been covered?). About half of the sample accepted this invitation to comment on their transitions to retirement as well as their once and present relationships to the university. Because the kinds of replies that retirees volunteered overlapped across these comment fields, we pool replies here thematically.

Gratitude. Complimentary comments were most prominent, supporting the observation in Chart 2 that 84% agreed that “KU has remained important to me.” “I very much treasure my years with the university.” “I am grateful to KU for paying me to do what I loved.” We have already noted the appreciation of HR personnel. About specific benefits, retirees applauded the policy whereby faculty and staff in some sectors of the university may permanently retain their email addresses. Among other academic amenities, continuing scholars valued their ongoing, full library privileges, including checkout of library materials, off-campus access to electronic resources, and interlibrary loan services.

Career complaints. Not all comments were rosy. Some retirees’ recall of the transition was colored by their long-standing dissatisfaction as employees with compensation, working conditions or unit management. The strategic direction of the university and its priorities also found disapproval. Such criticism was threaded into these respondents’ rationales for having retired and into their present low regard for the school.

Insufficient guidance. “I can’t believe they didn’t tell us this or tell us this sooner.” A typical remark under this theme was retirees’ wish they had had more step-by-step early guidance, a checklist, a timeline or a process manual leading to retirement. Paperwork seemed confusing. They would have felt better prepared with more specific direction and more personal attention from HR staff. Some retirees now regretted certain transition decisions (for example, retirement timing), saying that they would have done things differently if better informed. We can’t know from this survey whether they, in fact, weren’t offered sufficient advice, or whether they were inattentive to what was available.

As indicated by the last two items in Chart 2, a share of retirees wasn’t satisfied with guidance about the transition from KU health insurance to Medicare, calling it “difficult,” “complex,” “confusing,” and “crazy.” “I wish KU would have given me information on who to talk to for an overview of Medicare.” Some respondents also felt that financial advice

came up short. “I wish that KU would have provided more guidance on the financial aspects of retirement...or simply advise faculty to work with a financial advisor.” “I wish I knew more about my retirement funds.” A different postretirement surprise was the discontinuation of certain collections of software programs and university IT services. “I do wish that retirees were entitled to continuing access to university-licensed computer programs (Microsoft Office, in particular) and tech support. Having to go it alone has made it more difficult for me to continue with professional activities.”

Unpleasant endings. The department or unit’s handling of some retirements left a bad taste. Some felt pressure to retire: “Made me feel like they couldn’t wait to get rid of me.” Work was piled on at the end; project handoffs to others were clumsy. In vacating an office, some could have used help with the disposition of research and scholarly materials. Several respondents reported the unit’s indifference to the event of their retirement: only a cursory acknowledgment, or even a void of recognition. “No one said anything about my retirement, wished me well, or said goodbye.” Deletion from the departmental web pages, when it happened, felt dispiriting.

“A continuing relationship would make me happy.” Their transitions accomplished, many retirees wrote that they would welcome ongoing ties to their former department and its members. They are eager for news of theses and dissertations; job talks, hires and personnel changes; lectures and events. Although they may maintain personal relationships with colleagues and students, they can nevertheless feel cut off from the goings-on. “Make me feel like I matter,” said one. Respondents also pointed out that “retirees have a good deal to offer in the way of mentoring.” Also, “retirees sit on a huge bank of institutional memory that could easily be consulted by administrators.” A limited teaching role would appeal to other respondents. A few wondered, however, whether “my only value to KU now is as a potential donor.”

Life moves forward. Another wistful observation was “how quickly the ties sever” and how, in short order, the former workplace becomes unfamiliar. “I didn’t realize how quickly faculty and staff change, but I don’t know that there is anything that would have prepared me for that.” Citing the “great pace of change” in the university, the profession and the culture alike, “I see myself more removed and even marginalized from the things that occupied me in the past than I had imagined I would be.” This surprising distance from once-familiar settings may in some cases have been accentuated by the disruption of the pandemic.

Discussion

Though not often fielded by colleges and universities (as shown in study 1), surveys of retirees, using forced-choice and open-ended questions, can give institutions a read on how their retirees currently feel toward the school and how they look back on the way that their retirement transitions were handled. Such surveys can establish a baseline for future follow-up. Our KU case study (study 2) suggests five takeaways from the effort.

First, a canvass of retirees can gauge the extent of their affection, ties, gratitude and disposition toward service to the school. Here, we only reported results for ex-faculty, but administrative and professional staff also deserve to be surveyed. Survey replies can prompt schools to examine whether they are meeting retirees' desire for contact. Retirees' goodwill can benefit the institutional mission and reputation. Regular contact with retirees and receptiveness to their feedback could be a way to ease the estrangement of some retirees.

Second, a survey can reveal retirees' relative contentment with the way their separation from employment was administered. Feedback can identify suggestions for more satisfactory procedures. Preretirement programs and information should and must set realistic expectations about what is and is not in HR's remit. Circumstances that are beyond a school's ability to address should at least be explained or pointed out to retiring employees. HR staff members, for example, likely can't function as financial advisors or coach people through Medicare decisions, but staff can encourage older employees to avail themselves of professional expertise in the community.

Third, there is no such thing as too much information too often. Some of our respondents said: "I wish I had known" and "I wish I had been told." Had they actually been told but were inattentive? Web pages and retirement handbooks can furnish complete details about benefits and transition

procedures, and preretirement seminars can roll out hours of guidance. It may all be there, but prospective retirees should be pointed to such resources early in their careers and often thereafter.

Fourth, the HR office is but one player in ensuring a satisfactory passage to retirement. The department or unit has a critical role to play in making things go well, especially in the final days, for example, by anticipating knowledge transfer and the handoff of activities and projects; by recognizing retirees' career contributions and organizing a farewell; and by looking for opportunities to keep former colleagues informed about unit affairs and events. The school/college was the employer, but the department/unit was the workplace.

Fifth, there are many ways to be a retiree and many models for behavior in this next stage of life (Ekerdt, 2018). Yet all retirees confront the question: Who am I now? Retirees in higher education will also wonder and want assurance as they ask: Did my work and service matter? It does not take much for an institution to occasionally affirm that all those years and all that effort remains valued. Wrote one of our respondents: "Be mindful of the goodwill (or the lack thereof) you generate with a very small outlay of funds for retirees."

In closing, the IHE system needs to conscientiously act on behalf of its retired faculty, understanding and proactively planning for their needs. Their nameplates are off the doors and their spaces have been reassigned, but they can remain human capital for the academic and scholarly enterprise. Many want to keep in touch, and some want to assist and would be happy to be asked.

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