

MAIN THEMES: UBC RETIREMENT SURVEY

The main themes drawn from this study's interviews and online survey can be grouped into four categories: (1) personal experiences of the retirement process; (2) contributing factors in one's decision to retire or one's approach toward retirement; (3) quality and activities of retirement; and (4) views on retirement policies and processes. As mentioned in the Introduction and UBC Data document,

Personal Experience and the Retirement Process

Both online participants and interviewees reported a range of experiences in both the context of working environment in their unit and within the larger university culture. Retired or retiring participants also reported on their experiences in either going through the retirement process, while those who were not retired gave perspectives on retirement planning and their work activities.

Working environment and attitudes in the unit

Both interviewees and online participants answered questions about the working environment for senior members of their unit, whether they felt encouragement to retire from their unit or their university, and their perceptions about the value the university placed on their contributions. The online responses in these areas were primarily positive, with over 75% rating their working environment excellent or good, roughly 80% experiencing no encouragement to retire, and close to 90% indicating that they felt that their contributions were highly or somewhat valued by the university. Among interviewees the trend in the comments for these areas was also positive, although not all interviewees gave input on these topics.

Within the responses in all three areas, there were gendered differences, with some of these differences also related to the participant's employment status. Non-retired participants, both online and in person, reported noticeably less positive responses for women than for men in all three areas, with larger gender differences in the comments of those interviewed in person. For retirees, women interviewees also reported a less positive experience in all of these areas than men, with details given below. In contrast, the responses of retired female faculty participating online reflected a good working environment, not feeling encouraged to retire and feeling their work was at least somewhat valued; they gave positive responses more frequently than any other group responding online or in person.

In evaluations of one's unit working environment, the percentage of positive responses from non-retired respondents participating online was 20% lower for women than for men. This difference widened to 30% for non-retired interviewees. Among retired interviewees, there was a 50% difference between men's and women's reports of a

positive work environment. Nearly half of the women interviewed rated their working environment as neutral or offering no response to this question, while 80% of the comments from males indicated a positive work environment. Working environment was the main theme of the negative comments from retired online respondents in the free form responses to these and related questions, accounting for roughly half of these comments.

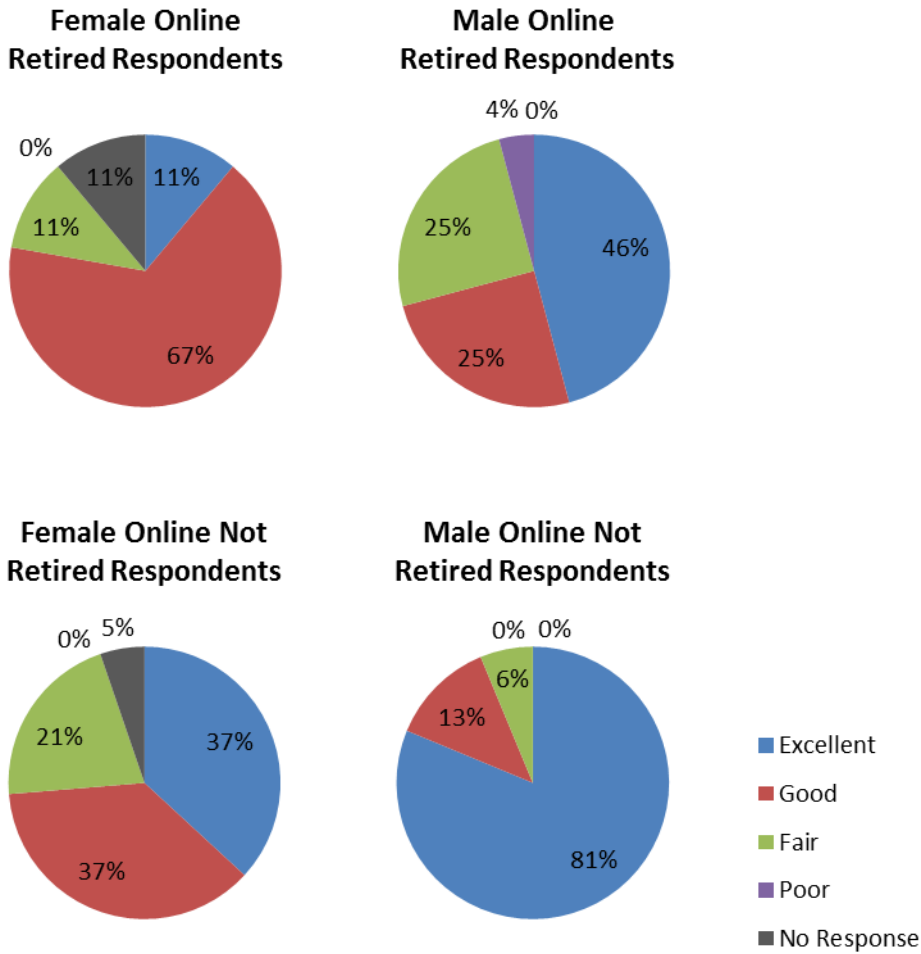


Fig 1. Responses from Retired (top) and Not Retired (bottom) online survey respondents when asked “How would you describe the environment in your department towards senior academics?” Note: A statistically significant difference was found between the female and male responses to this question for both retired and not retired respondents.

A larger percentage of non-retired women, 21% reporting online and 40% reporting in person, indicated that they felt encouragement or pressure to retire, as compared with responses from non-retired men, 6% online and 0% in person. One retired man shared

that he felt “Maybe more an internal pressure? I felt it was my duty to hand over the money to younger people.”

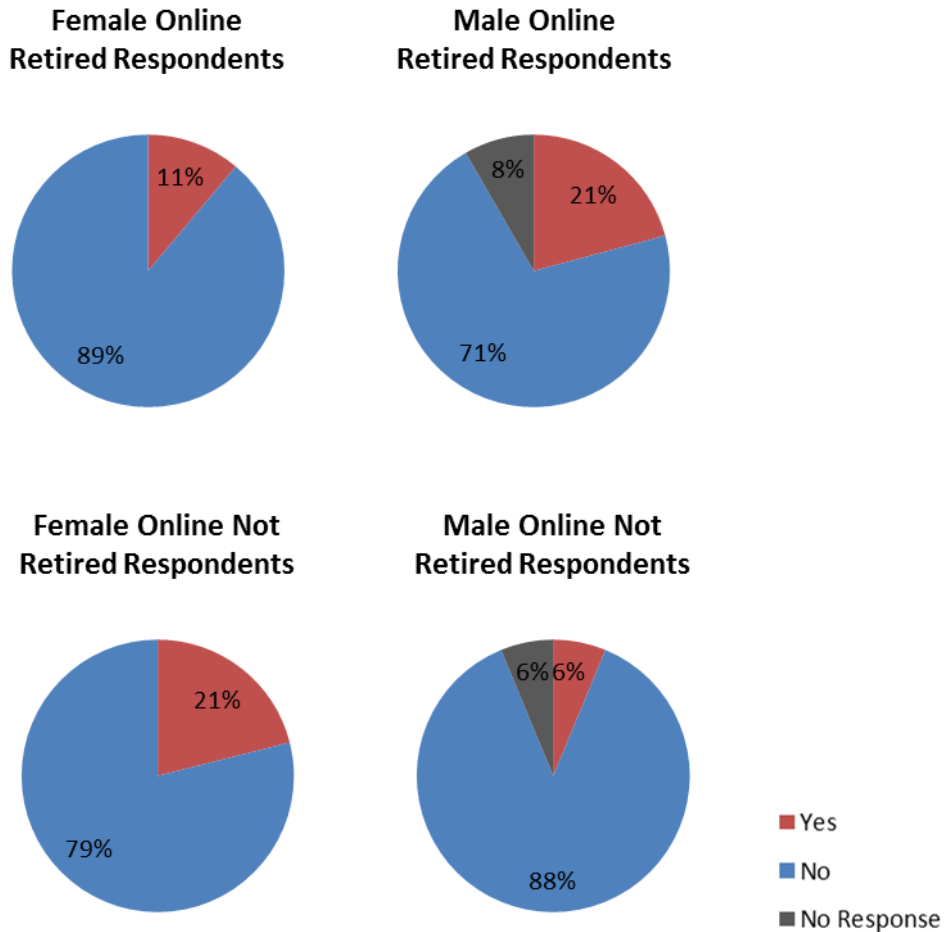


Fig 2. Responses from Retired (top) and Not Retired (bottom) online survey respondents when asked “Did or do you feel any institutional or departmental encouragement to retire?”

In terms of feeling valued there are noticeable differences between male and female responses both in person and online. When indicating their perception of whether the university values their contributions, 16% more of the non-retired men’s online responses were positive, as compared with non-retired females responding online. This gendered difference increased to 21% for retired interviewees and 62% when comparing responses of non-retired interviewees. The online participants reported a mix of concerns on productivity, department finances, recruiting the next generation of

scholars, and collegiality in this context. While most indicated that they felt valued for research and productivity, over half of the comments from retired faculty online mentioned the value that their work holds outside of UBC, but did not necessarily perceive that their work holds the same value at UBC. One retired male online respondent commented on the value demonstrated by his department for its “diminishing number of senior academic faculty members”, adding that in his case “they repeatedly communicated their feelings of loss on my leaving and struggled to find people to do the work I had done”.

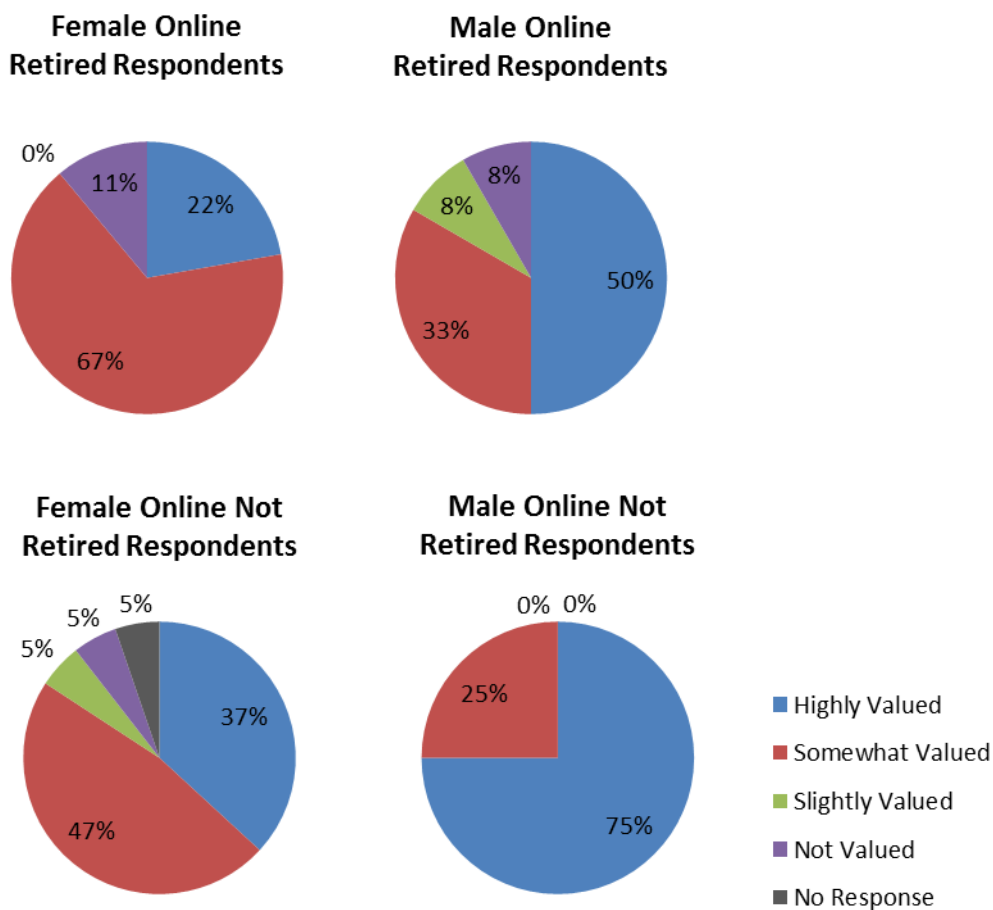


Fig 3. Responses from Retired (top) and Not Retired (bottom) online survey respondents when asked “Did or do you feel that your contributions to the university (research, teaching, educational leadership, administration, service, community involvement, etc.) were/are valued?” Note: A statistically significant difference was found between the female and male responses to this question for both retired and not retired respondents.

Non-retired online participants were also asked to indicate which activities they enjoyed most about their work; those reported as most enjoyed were student interaction, intellectual stimulation, independence, and flexibility, with some additional positive comments made on productivity and colleagues. Areas reported as least enjoyed concentrated in the areas of administration, bureaucracy, various administrative aspects or duties of undergraduate teaching, and politics.

Culture:

Culture was considered a notable factor in the way in which one approached retirement, contributing to general views on retirement and retirees. One participant envisioned value being tied to pay as problematic in the wake of mandatory retirement ending, mentioning that that this would continue “until we get over the idea that you’re not valued unless you’re paid...it’s a big problem because we’re all going to live so long”. Several interviewees referenced the respect for elders that exists in different cultures, including that “the way Aboriginals treat elders is much healthier than the way we treat elders”, with additional comments reflecting on the ‘high respect and good manners’ shown towards elders in East Asian culture. Noting that this respect translates into valuing elders as mentors, a participant stressed that “we’re a young-centric culture. Experience doesn’t figure in all that much.”

Retirement process and planning

Online retired respondents reported primarily positive experiences in their retirement processes, with 75% of them indicating that they found their retirement planning process excellent or good, as shown in the charts below on clarity and accessibility of the processes. The online responses from retired women are somewhat more positive than those of their male counterparts, with a statistically significant difference between male and female online responses to the question asking about one’s satisfaction with their process of retirement. Online responses on clarity and accessibility of options, policies, and procedures were concentrated in very/mostly clear and easily accessible/accessible for both male and female retirees. Similarly, 70% of the comments from retired interviewees on retirement process were positive, with comments from 19 on clarity, 16 on satisfaction, and 12 on their feelings about the decision to retire.

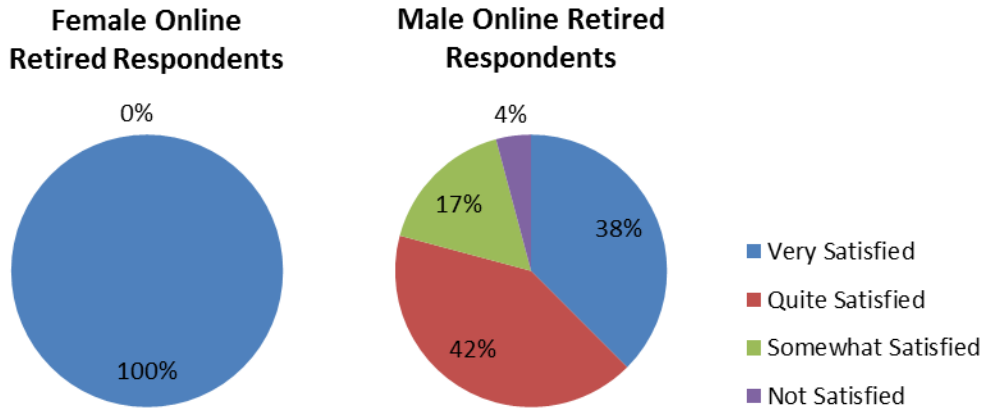


Fig 4. Responses from Retired online survey respondents when asked “Are you satisfied with the process of your retirement?” Note: A statistically significant difference was found between the female and male responses to this question. One female respondent left their response to this question blank and is not counted in the figure above.

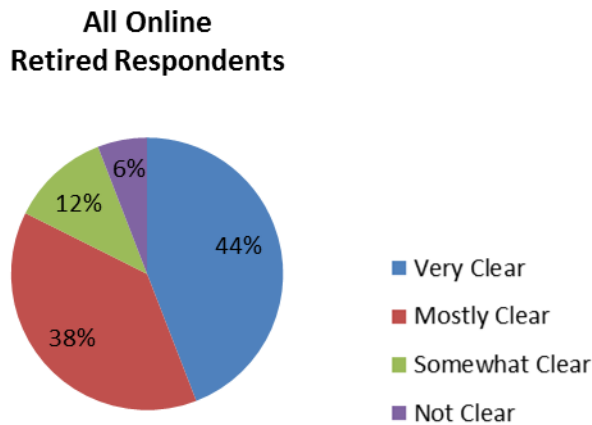


Fig 5. Responses from Retired online survey respondents when asked “Were policies, options, and procedures clear?”

All Online Retired Respondents

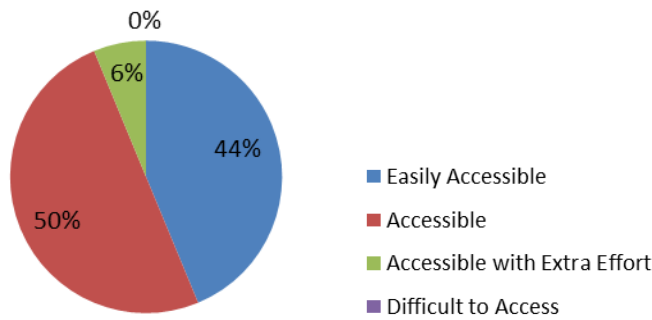
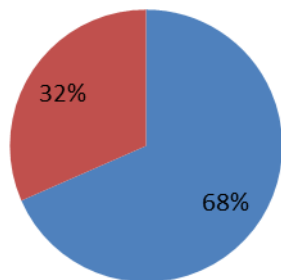


Fig 6. Responses from Retired online survey respondents when asked “Were policies, options, and procedures accessible?” One male respondent and one female respondent left their response to this question blank and are not counted in the figure above.

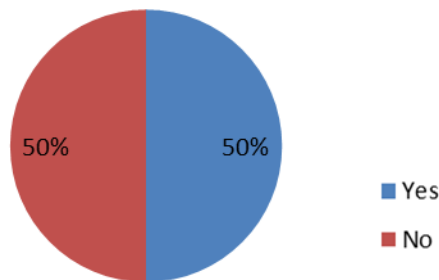
A number of retired online respondents indicated the importance of access to financial advice, with several also noting the value of various retirement seminars, or information available from UBC’s Association of Professors Emeriti. When commenting on retirement options, a number of online retired respondents mentioned the value in flexible arrangements and reorganization of workload that supported their smooth transition to retirement.

Non-retired online respondents were asked if they had considered retirement, and if so, when. While no statistically significant difference was found in the first question, the difference in responses can be seen from the figures below. A larger percentage of female respondents had considered retirement, and on average earlier than male respondents who had considered it.

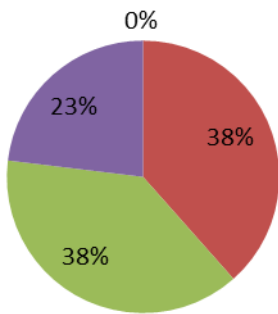
Female Online Not Retired Respondents



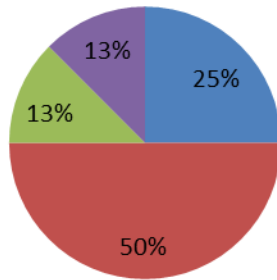
Male Online Not Retired Respondents



Female Online Not Retired Respondents



Male Online Not Retired Respondents

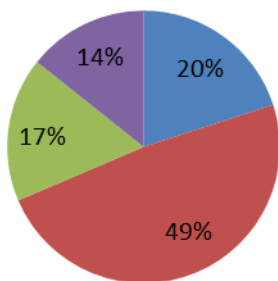


- <1 year ago
- 1-3 years ago
- 3-5 years ago
- 5+ years ago

Fig 7. Responses from not retired online survey respondents when asked “Have you considered retirement?” (top) followed by responses, from those who answered Yes, to the question “When did you begin thinking about retirement?” (bottom).

Nearly half of the online non-retired/retiring participants indicated plans to retire in the next 5-10 years, the remaining responses were roughly evenly distributed between the three remaining options of planning to retire in less than 3 years, in 3-5 years, and in over 10 years. Additional comments about the timing of one’s retirement included considerations of finances, health, retirement options, working climate, and future planning. Some participants also indicated experiencing a lack of clarity from their own unit.

All Online Not Retired Respondents



- 10+ years from now
- In the next 5-10 years
- In the next 3-5 years
- In less than 3 years

Fig 8. Responses from not retired online survey respondents when asked “Do you have plans to retire in the next number of years?” One respondent left his response to this question blank and is not counted in the figure above.

Contributing Factors in Retirement Decisions and Approaches

Atmosphere in the unit, feelings of value, and pressure to retire have been discussed above in the context of experiences and processes around retirement. These were also mentioned in the context of factors in retirement decisions, with participants pointing to several internal factors – departmental politics/changes, recruitment of the next generation of scholars, and workloads - as well as external factors – family, financial, and health concerns. Other reasons given included whether one’s job was enjoyable, personal or professional timing, ability to perform one’s job, and opportunities for a different focus.

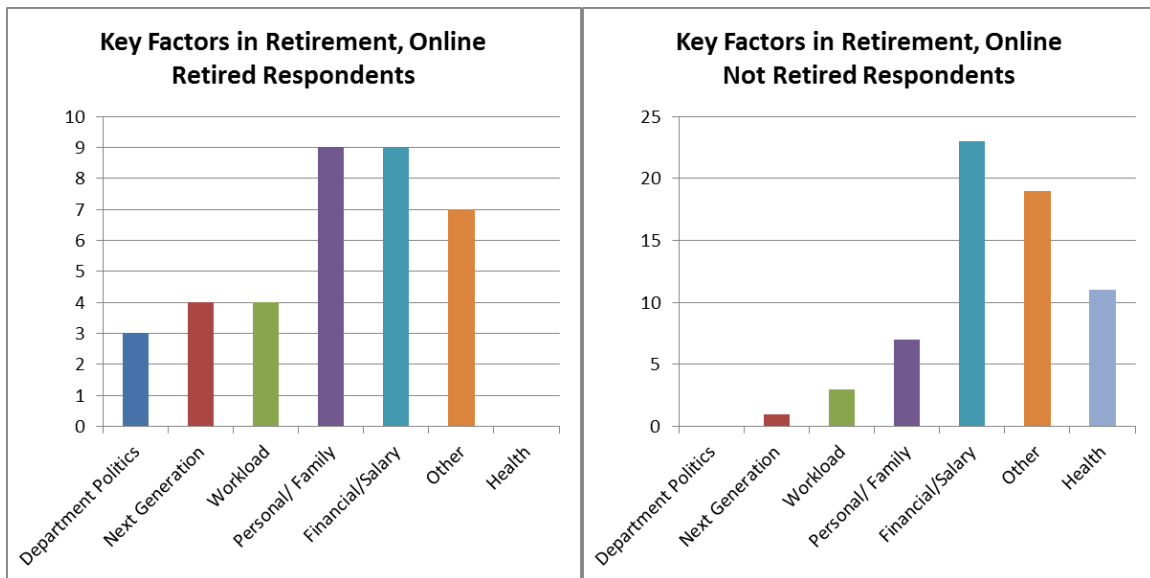


Fig 9. Responses from online survey respondents when asked either “What were/are the key factors in your decisions around retirement?” (Retired) or “What are the key factors that you might consider with regards to your choice to retire or not?” (Not Retired). Respondents could choose more than one factor.

Department politics/change: A few online participants cited department politics as a factor in their decision to retire, as did a larger percentage of interviewees who noted that department politics affect the atmosphere for the senior members of the department or Faculty. Several participants found that periods of structural and administrative change were pivotal points in considering the timing of their own retirement. Politics and change were factors in the retirement motivations for nine women interviewees (both retired and non-retired), but was cited by only one male interviewee as a factor in his retirement decision. One participant concluded that “it made sense to me, given the transitions, it was kind of the right time for me to go.” Another, using quite a different tone, said that the “significant changes in the university

administration at the faculty level...people in my unit were not very happy about, myself included...it was just another reason to think 'I've had enough'." Sentiments of frustration at political in-fighting were present in six of the women interviewee's narratives, where decisions to retire in these environments were likened to 'giving up battles' and no longer being able to 'push back.' Four of the retired male interviewees made general comments related to changes in university priorities and the student body, interaction with the leadership in retirement decisions, and struggling with resistance.

Next generation: Seventeen of 53 interviewed participants (32%) mentioned recruitment opportunities for the next generation of scholars as a consideration in retirement, reflecting on the necessity for renewal, innovation, balance and productivity. Twenty-two interviewees indicated that they felt an 'obligation' to step aside to allow for 'new blood.'

Recruiting the next generation of scholars was indicated by only five of the online participants when asked to indicate key factors in consideration or decisions around their own retirement. However, comments on the next generation or recruitment were made throughout the online survey in the context of working environment for senior academics, encouragement to retire, future plans to retire, attitudes, and scholarly activities in retirement, and in the spaces provided for additional comments.

Workload:

Workload was cited by some of the online participants as a key consideration in deciding to retire, both those retired/retiring and those not yet retired. Two female interviewees, one retired and one non-retired, indicated workload concerns as a personal reason for retirement. Among interviewees, only women (six out of 25 female interviewees) spoke about obligation in the context of workload, mainly in general comments, such as "There's a certain sense that there's an obligation to do this kind of [service] work ... for many women" and "I don't mean to suggest that it's forced on us but we do take [a bigger service load] on." Others felt the pressure more strongly; for example, a female online not-retired participant, reflected that her service load had been heavier than that of her colleagues, with a negative impact on her publishing life. "Being pressured to give up even more time to service and administration", she concluded that retiring was a way "... to get all of that off my back so I can continue my scholarship while people still want to read it."

Family/Personal life:

Sixteen of the online participants (nine retired/retiring, seven non-retired) identified family or personal reasons as a key factor in contemplating retirement. These

were also mentioned in response to questions about plans for retirement, activities in retirement, and in the space provided for additional comments. Among interviewees, family was discussed as a gendered obligation—three out of 28 men and ten out of 25 women spoke of it. While plenty of recognition was given to this concern in the interviews, only two retired women and one retired man stated this as one of their personal reasons for retirement. In their narratives the obligation of child-rearing influenced progress, as one woman mentioned, “women are generally late coming on because of family.” A man echoed this sentiment saying that “for women [an academic career] is even more difficult...particularly if you have a family.” Three women attributed their late-starting career as a reason for staying on rather than retiring. Three participants specifically discussed the financial struggle of single parenting as a reason for continuing to work. Furthermore, several participants acknowledged that women were not only in charge of caring for their children but also often responsible for the care of their elderly parents. Referencing her elderly parents one woman participant shared, “...all of a sudden you have new family stresses”. Another participant stated that in addition to work commitments, “I have children, a husband and an aging mother so I knew that [in retirement] I could spend more time with them ”.

Financial:

Financial considerations were the most frequently reported key factor indicated by online respondents, with nine retired/retiring and 23 non-retired individuals highlighting these issues. Salary and other financial issues were also mentioned by online participants in response to questions related to encouragement to retire, value of contributions, plans to retire, and in the space provided for additional comments.

Interviewees commented on financial issues related to their own salary, but also brought up bigger picture financial concerns such as productivity and the observed impact the moratorium on mandatory retirement has had on recruitment. When salary was discussed in the context of one’s retirement decisions, the comments often touched on negotiation, culture, and personal factors. One retired participant, who was the only woman in her department at the time she was hired, reported being “hired at a lesser salary than a colleague that was hired with me at the same time.” Three women attributed this to the negotiation process, with one non-retired woman stating, “Women didn’t negotiate starting salaries, you just got a job and you worked, you didn’t even ask”, adding that men did ask. Another non-retired woman indicated barriers could accumulate over time, but were potentially self-imposed – as she found herself “being afraid to even ask.” However, salary was a factor reported not only by female participants. A non-retired man tells, “If I had known to negotiate when I was young and eager to get a job...it would’ve changed what my salary is today.” Another retired man confirms, “When you start off behind academically it’s really hard to catch up, *if you can*

catch up.” Others mentioned a career that started later in life or other personal factors that affected their financial situation.

Health:

Health was indicated by 11 online non-retired/retiring respondents as a key factor that they would consider when making the decision to retire. None of the retired/retiring respondents chose health as a key factor in their decision.

Concerns about health were brought up equally by retired and non-retired participants in the interviews. These concerns were concentrated primarily on either access to medical benefits or the maintenance of good health. One participant described medical coverage after retirement as “quite abysmal” and maintained that “there’s a pressure for people of my age not to retire if only to maintain the medical benefits that come with working at UBC.” Non-retired interviewees either described their health as a reason to stay on or poor health as a reason to leave. Good health was also considered a reason to retire in order to ‘seize the day’ and to pursue an active life in retirement.

Quality and Activities of Retirement

Participants expressed a variety of different attitudes towards retirement which appeared either to help ease their way through the transition to retirement or to contribute to feeling uneasy about it. Their responses and comments covered the topics of expected retirement activities, identity, agency, and legacies.

Retirement Activities:

Among interviewees, retirement was generally envisioned in one of three different ways: as a new stage in life, as a fantasy, or as a change in name only. Of those who considered retirement to be a new stage in life (14 out of 53 interviewees), most viewed it as a positive transition in which they could do as they pleased whether it be continuing scholarly activities, spending time with family, focusing on hobbies, volunteering and/or travelling. One participant describes it as a time of ‘vitality’ while another “look[s] forward to doing other things; you’re not dying, you’re retiring.” This group of participants was equally represented by men and women. More than one participant conjured up visions of relaxing: “I picture myself sitting on a beach. Just drinking something nice...the phone isn’t ringing and I’m not receiving 25 emails.” On the other end of the spectrum there were six non-retired interviewees, five men and one woman, who could not imagine their lives shifting from their current work routine and were ambivalent towards the idea of retirement. One participant continued to work full time in retirement, contending that he enjoyed this lifestyle and that money was

“not the driving force of work”, while also noting that his partner had declared his retirement a “bust”.

Other participants highlighted the importance of a positive attitude and outlook for retirement, given the potential for indecision and avoidance of the topic. Respondents reported on experiences where resentment changed to relief and where a direct contemplation of retirement facilitated a smooth transition. The metaphor of a cliff was also used, reflecting that one could prepare a parachute or a ramp to provide a transition with “grace and dignity”, in contrast to “hanging [on] with tooth and fingernail”.

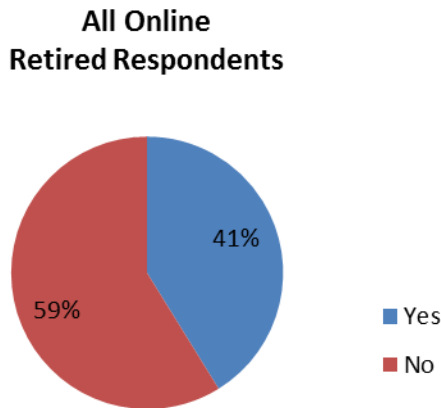


Fig 10. Responses from Retired online survey respondents when asked “Have you found or do you plan to seek re-employment after retirement?”

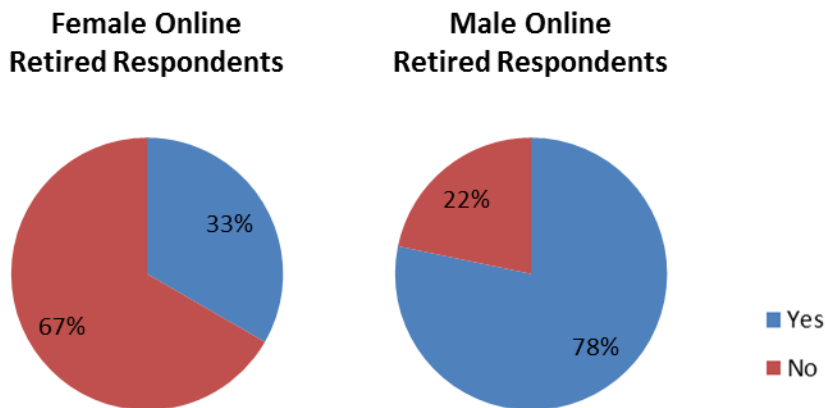


Fig 11. Responses from Retired online survey respondents when asked “Have you or do you plan to continue scholarly activities post retirement?” Note: A statistically significant difference was found between the female and male responses to this question.

Online participants reported a variety of activities in retirement. Retired/retiring participants were asked about seeking employment after retirement and their plans to continue scholarly and other activities in which they had been engaged. Forty-one percent reported working after retirement. This work included both paid and volunteer work, externally and at UBC. Twenty-five interviewees also commented on whether or not they had sought or would seek work in retirement, with roughly half indicating that they had or would.

While there was no significant difference in female and male responses to working after retirement, there was a significant gender difference among online responses to the question inquiring about one's plans to continue scholarly activity post retirement. Seventy-eight percent of male online respondents versus 33% of female respondents indicated that they have continued or plan to continue scholarly activities post retirement. In contrast, of the 20 interviewees commenting on their plans for scholarly work in retirement, eleven were women, and 9 were men.

Most of the comments reflecting on scholarly work discussed continuing one's research and writing, some individuals noting that they continued with funding and some without. Ongoing teaching or administrative duties were also discussed in response to this question. A number of comments emphasized the increased flexibility of a post-retirement academic life, including the ability to customize the components of one's academic involvement. A few mentioned the impact that finances/funding has on their ability to continue their research. A more open-ended follow-up question about retirement activities garnered responses that were evenly split between academic/scholarly activities and non-academic plans (travel, family, interests or hobbies, community). Roughly a quarter of these indicated a combination of scholarly and non-academic activities. Some participants also provided additional comments on plans or priorities, with most of these extra comments describing scholarly or mixed scholarly/non-academic activities. Additional themes included the importance of having options, agency, and choice, as well as support from the university, department, or discipline.

Identity and agency:

The interviews provided rich insight into how participant identities and attitudes surrounding retirement are constructed. There were three common discussions around the issue of identity: (1) it is tied up with work; (2) multiple identities make the transition to retirement relatively easy and desirable; and (3) there was a gendered difference in terms of the attachment to work as a source of identity. Eight out of 53 participants (15%) either spoke of their own identity being heavily tied to work or spoke on behalf of colleagues who they thought displayed this attachment. Five men considered their work to be integral to their identity and a sixth spoke on behalf of his

colleagues. Two women spoke in general terms about their observations of other women, and one added “I think it’s really wonderful to be able to continue to be involved if you really want to”. Women who did consider their identity to be closely aligned to work had attitudes that were largely ambivalent towards retirement, deciding to work whether they’re being paid or not, as one woman commented: “It’s tough to suddenly lose that power and aura...” Four participants, three women and one man, mentioned they had other parts of their lives, for example , their family lives and/or involvement in hobbies which helped to ensure that retirement would be ‘rich and full’. Four participants, all women, considered the issue of identity as a gendered issue, with one stating, “I think [women have] always had a bit more balance in our lives...” and another sharing, “I suspect women aren’t quite as caught up in their work as their identity.”

In response to the question, “How do you currently feel about your decision to retire”, the comments from online respondents were mostly positive. Related themes of consideration for the next generation, agency, and value placed on one’s contributions appeared in response to both this question and in the comments on one’s activities in retirement. Among the 12 interviewees who commented on their decision to retire, nine indicated positive feelings. A number clearly pointed out, not only in response to this question but at other points in the survey, that the choice to retire had not been theirs as they retired in the era of mandatory retirement. On this topic there were expressions of both frustration and satisfaction. As one female online respondent wrote about her own mandatory retirement, “the lack of choice led to a very interesting and stimulating change” before going on to describe her many retirement activities.

Additional comments were made on the significance of agency and flexibility in determining a satisfying retirement path. Retired/retiring online respondents made these comments in response to questions about UBC retirement options, or in reflection on the different types of scholarly and other activities in retirement. In the space provided for general comments, non-retired online respondents indicated in various contexts that they valued agency and flexibility in the process of determining their future retirement. They noted the potential for involving emeriti in a variety of university priorities.

Legacy:

For interviewees who had not yet retired, the idea of securing one’s legacy was identified as a factor in their outlook towards retirement. Six out of 53 (11%) interviewees, four women and two men, commented on the importance of a legacy. These individuals could not positively envision retirement until provided with certainty that their programs would continue after their retirement and/or stated with regret that their exit would mean the disappearance of their program as they envisioned it. “I want

to leave when I get things to the point where I know the program won't crumble when I go," stated one woman. Another considered, "I need to mentor somebody to step into that [program] because I do not want to see it get damaged in any way." One participant remarked on the need for continuation, "...sometimes I feel that [when] I retire ... everything [will] shut down and the program – my program— disappears." Thus for some, the ability to protect their legacy is a critical consideration in retirement.

Views on Retirement Policies and Processes

Both online and interviewed participants expressed strong opinions regarding 'who should retire,' while reflecting on the effects of lifting mandatory retirement and UBC retirement policies. These comments focused on productivity, the effects that lifting mandatory retirement has had on the lives of academics (as they consider retirement), and the effects of related policies on the university itself.

Productivity

The topic of academic productivity surfaced in 19 out of 53 interviews (35%), almost equally across genders and retirement status; it was generally connected to views on which faculty members should stay on or leave. This issue arose largely in conversation as an anticipated consequence of lifting mandatory retirement. The concern is that some of those who are staying on past 65 are being paid for work that does not reflect their output. One participant opined, "People are freeloading, in my opinion, not just at UBC but in general, because you...can't work the same way in your early seventies as you did in your early thirties." However, a couple of participants stated that although their research was not the same as it was 20 years ago, it is "a different kind of research [that] other people seem to value." Another participant, referring to a lack of productivity observed in a member who continued past age 65 after mandatory retirement was lifted, described this behaviour as setting "a bad example for the next generation." While opinions ranged widely on the correlation between age and productivity, all of these narratives suggested that faculty saw the importance of viewing productivity with heightened awareness as an accompaniment to lifting mandatory retirement.

Both retired and non-retired online participants expressed similar sentiments about the importance of productivity in their comments. These remarks were primarily made in response to questions about the working environment for senior academics and whether they had experienced any pressure to retire, as well as in the general comments. One non-retired online respondent saw a great need for the university to eliminate the stereotypes of older faculty members as "dead wood" and the ageism associated with these attitudes.

Lifting of Mandatory Retirement

A large group of interviewees (17 out of 53, 32%) made observations and predictions about the effects that the lifting mandatory retirement had or would have on the university. They shared their opinions on whether they felt the effect was positive or not, with some connecting to their own experience. These opinions came from both retired and non-retired faculty, seven women and ten men. Nine of these 17 participants viewed the lifting of mandatory retirement negatively, citing a lack of renewal, loss of funding for faculty hiring and rewards, and questions about faculty productivity. Another of these participants stated that she “loved” mandatory retirement, “because I started to think about it beforehand...you didn’t lose face ...It was like, this is what happens to everybody.” Another viewed staying on past 65 as “selfish and irresponsible.” Three ambivalent participants contended that the negative effects of post-mandatory retirement were not necessarily due to the policy itself, but rather to its administration by the university. The remaining five participants regarded the lifting of mandatory retirement as a positive development; they all thought that, as a consequence, faculty would have more agency resulting in an “ideal workplace...[that is] a free choice,” leading to a more personalized and positive retirement experience.

Participants also offered opinions on how well the university responded to the lifting of mandatory retirement. There were seven interviewees who mentioned retirement options or incentives in their narratives. One woman commended UBC on providing options for retirement and offering the possibility of graduating out of a full workload. Two participants who received Early Retirement Agreements (available until 2003) report, “It was a no-brainer to take the money and run” and “If the package hadn’t been there I probably would have stayed on but probably carrying a reduced load.” Other interviewees recognized shortcomings in UBC’s response to the lifting of mandatory retirement. For example, the withdrawal of incentives was seen as having drawbacks, such as increased responsibility for unit heads. Some individuals also foresaw greater reliance on different types of agreements as a critical part of future planning in units. Online participants indicated the need for leadership in Faculties and departments, recognizing that effective handling of retirements provides both options with clear processes and opportunities to recruit the next generation.

Additional comments emphasized the ongoing potential for retirees to contribute both to unit and to university priorities, as well as the need for recognition and involvement of those who continue to be active in retirement.