

HOW TO STATE THE OBVIOUS:

Why Retirees Are of Value to Their Institutions of Higher Education and How Retirement Organizations Translate That Value into Action for the Institution

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It is well known that higher education institutions face many crises/challenges. What possible advantage could administrators find in supporting retired faculty and staff to stay engaged when the pressures are so profound in “other” areas? In fact, the “other” areas can be addressed by engaging retirees who have many years of experience and service.

Those 200-plus institutions in the United States (and several more in Canada) with Retirement Organizations (ROs) understand their value (1). There are 2,800 or more known Bachelor’s degree-granting institutions without ROs (2) whose faculty and staff ALSO retire, many with an interest in continuing an association with the institution that was the center of their professional lives. In addition to making the case to campus administrators about ROs, making the case to government, the media and the

public is just as important. The arguments for administrators will be the focus of this article.

“Why should administrators care? After all, retirees are seen as finished with their academic life.” Tenured faculty who are active in fulfilling their responsibilities may not wish to change anything at all by retiring. The conundrum for the institution is profound; these senior faculty are very expensive (if the institution pays their salaries, and in public institutions, this is the norm). These senior faculty occupy space for labs and offices that are unavailable for new hires. Yet, if they are productive in research and teaching, why should they get “out of the way?” And if they retire, how can they continue to do that which they love, and which may keep them healthy, vital and engaged in the institutional community?

Paying more attention to the needs and desires of retirees allows institutions to have their cake and eat it too. Creating a Retirement Organization provides a framework for managing and administering to the needs and desires of retirees at a fraction of the monetary cost of salaries and benefits while reaping the substantial strength of continued engagement of these experienced colleagues (3). This value accrues for both retired faculty and retired staff.

For example, at the University of California, a ten-campus system, the Council of UC Emeriti Associations surveys retired faculty every three years, asking what they have been up to, on- and off-campus. The results of the latest survey indicate that the teaching, research and service (and grant funding and philanthropy) of the retired faculty would be the equivalent of a full eleventh campus at the University of California (3).

This is also exemplified concretely at the University of Cincinnati. It has recently established an Emeritus Center based upon concerted efforts of the Emeriti beginning in the spring of 2013. Convincing the administration of the Center’s value emphasized two fundamental levels. First, the Emeriti worked with their UC Foundation to determine that from FY04 to FY13 Emeriti contributed an average of \$1.6 million annually. In FY14 that increased to \$1.8 million, and in FY15, to \$2.2 million, at least suggesting a role increased Emeriti activity at the university may have played in these significant increases.

Also, working with the Research Division, University of Cincinnati Emeriti were able to determine for FY15 that 44 Emeriti received 77 external grants for which they were given \$45 million in intellectual credit. Second, Emeriti offered

to oversee numerous university-related activities: e.g., having an annual Recognition and Appreciation Dinner for new Emeriti, annual Undergraduate Mentorship Awards to work with active Emeriti on research and scholarship, development of an oral history legacy project, provide Emeriti for mentoring of both undergraduates and graduates, improving the Transitions to Retirement Progress through developing a comprehensive Transitions Checklist, improving a monthly Luncheon Speaker Series for both active and retired faculty, and beginning an Emeriti Community Services Corps. These contributions resulted in the University of Cincinnati Provost increasing the Emeriti budget from \$2,000 in FY13 to \$20,000 in FY16 and \$30,000 in FY17.

There are many other examples of Retirement Organizations and regional consortia that engage retirees to positively impact the communities in which many have worked for so long.

Senior retired staff must not be overlooked. Their historical memory and diplomatic experience with academic personalities provide invaluable resources for current staff and administrators and faculty. The retired staff have already experienced current challenges and the many different ways solutions have been implemented (some successful, some abysmal failures). Having a staff Retirement Organization (or a joint faculty-staff RO) allows a fruitful sharing of

strategies as well as keeping valued staff engaged and appreciated as they partake in activities beyond those for which they had time as full-time employees.

Administrators for institutions without a Retirement Organization may be thinking these efforts are all well and good, but how are they established? In addition, how do senior faculty and staff become convinced that retirement allows their continued involvement in higher education activities and issues, as well as participation with their active and retired colleagues? Provosts and Human Resources leaders who work with ROs can be in touch with their own colleagues across the continent about how and why they support ROs.

The Association of Retirement Organizations in Higher Education (AROHE) can assist with the logistics of exploring the interest in an RO as well as setting one up through its consultation services expertise. ROs across the United States and Canada have very varied funding levels as well as activities, all specifically matched to the particular institutions. The lessons from these institutions can be shared by AROHE leaders and Board Members. Indeed, AROHE members are available to talk with their colleagues at non-member institutions, and they are also ready to consult on how to talk with reluctant administrators to set up ROs that work within one's own institution. Learn more at <http://arohe.org> or contact AROHE by emailing info@arohe.org

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Convincing active faculty and senior staff that retirement is just another



of life's productive chapters requires the assistance of current retirees as well as the implementation of Retirement-Friendly Policies at institutions of higher education. These policy implementations are not only cost-effective, they are very frugal. As but one example, see the "Bill of Rights" of retired faculty at the University of California, Berkeley (4). The stories of retirees are the most convincing, especially when their institution values their service while actively employed and their engagement after "retirement."

Retirees from higher education need not "go away" from academia. While some choose not to engage in any activity with their institutions, many do prefer to continue intellectual enrichment, camaraderie and professional identity in their "fourth quarter of life."

REFERENCES

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