

### **Extracts from the UBC APE 2017 Survey Report**

This report integrates the statistical data with the results of an analysis of the write-in comments of a survey conducted by the University of British Columbia Association of Professors Emeriti (UBC APE) in 2017. Initially, a report of an analysis of the write-in comments was produced by dividing the responses into two groups (2006 and 2007), representing the respondents who retired before and after the change of the mandatory retirement rule in January 2007. However, there were no significant differences between the two groups, so this report focusses on the whole population of respondents. The analysis also involved cross-tabulations of results by faculty/school.

The target population for the 2017 survey was 1547 retired UBC faculty and librarians. However, due to missing contact information and known health issues of some respondents, only 1048 Faculty and Librarians were invited to participate in the survey through email and a notice placed in the UBC APE newsletter. The number of responses received was 315 (30% response rate). Only 211 (20%) respondents completed all questions.

### **Results**

More than half of the respondents are between 70-79 years of age. More than half of the respondents are from the Faculty of Arts and the Faculty of Medicine. Two-thirds of them retired between 2001 and 2015 and approximately the same number are members of the UBC APE. The one-third who did not join UBC APE had other commitments that took precedence. Most of the respondents began to think about their retirement between 60 and 65 years of age.

Two major themes emerge with regard to retirement. First is an attachment to their “university lives” within their academic unit and the university at large. Respondents anticipated missing various aspects of their work life, from the daily routines of teaching, research and interactions with students and colleagues to the broader involvement in the university community. A comfortable retirement and indeed a possible inducement for retiring early involved the provision of a supportive environment at both the department and university levels.

At the department level this meant being provided with the means (for example, departmental space) for continuing their research and teaching. Respondents also reported on the various ways departments continue to engage Emeriti including the invitation to social events, the listing of Emeriti on department websites and to some extent the provision of designated space. Departmental support goes a long way for Emeriti because many suggest the University has not done enough to recognize and value their contributions to the University and the broader communities. Respondents also suggest that Human Resources recommend all Emeriti request an unsalaried appointment to their department. At the university level, respondents favoured additional perks like free access to campus activities, reduced prices for Emeriti travel opportunities, free access to Continuing Education courses and the request that Human Resources arrange for reimbursement of expenses related to continuing scholarly activities. Finally, setting aside a central space for Emeriti, alongside the provision for students and alumni and similar to the old Faculty Club, would have particular value.

The second major theme is the concern about income decrease on retirement and hence financial security. A comfortable retirement meant having a reasonable income and being prepared financially. Included here is the worry about paying for health insurance. The most important inducement to retire early would be the commitment by the university to pay for extended healthcare insurance.

What respondents valued most from the list of services provided by the UBC APE is the newsletter, monthly email alerts, and the website. As for the newsletter itself, respondents valued two main aspects: announcements of Association meetings and programs as well as other UBC events and talks, and getting the newsletter online. The respondents provided overwhelming support (80%) for APE to nominate Emeriti for awards mainly because of their important contributions to the University and society at large. The APE is highly regarded as the body best positioned to assume this role. Although the number of those who did not support the idea of the APE nominating Emeriti for awards is small, their comments are worthy of consideration; particularly the comments suggesting retired faculty should leave award nominations to the younger generation who are still in the “rat race”. The only exception would be for awards that do not compete with the current ones, for example, awards for lifetime achievement.

Emeriti and retirees would like UBC APE to concentrate their advocacy on the protection of official Emeriti perks, UBC retirement and survival benefits, alternative medical and travel insurance, advice for transition to retirement, and support for continuing scholarly activities. While the minority of the respondents thought joining the APE early (at age 60) would help them adjust well to their retirement by learning from the experiences of those already retired, the large majority did not think so because they adjusted easily. The overwhelming majority (approximately 90%) are happy with their post-retirement experience because they were/are still able to continue to engage in activities on campus (academic or otherwise) for a while after their retirement. For them, to retire comfortably is to still be able to engage after retirement through options like “pre-retirement part-time” and to plan a kind of staged retirement strategy. The HR, as well as the APE, is playing an important role by offering better and personalized preretirement planning programs. Being in the company of their old networks and new ones, and the opportunity to pursue other hobbies and interests, also make Emeriti happy in their post-retirement.

Submitted by Donald Fisher, Vice-President UBC APE on behalf of the APE Continuing Scholarly Activities Committee