

Forum

The Academy Is Aging in Place: Assessing Alternatives for Modifying Institutions of Higher Education

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Abstract

Institutions of higher education employ a greater proportion of persons over 65 relative to the general labor force, and the median age of the professorate has now surpassed all other occupational groups. Such a novel demographic change in the academic workforce presents several unique challenges. Should institutions modify policies and programs that provide more opportunities for aging faculty to remain healthy and productive, or should efforts focus on facilitating retirement? How universities and colleges choose to retain or retire their aging faculty certainly has become a point for consideration. This forum presents what is known about the aging academic workforce and describes current institutional responses. The discussion then builds on the notion of aging in place, presenting a more holistic approach to the modification of institutional policies and programs that support continued faculty engagement as well as mutually agreeable retirements. In particular, institutions should consider making modifications that increase targeted health and wellness programs, expand retirement counseling services, and offer varied retirement pathway options as viable responses to the continued aging of the academic workforce.

Keywords: Faculty, Tenure, Workplace, Retirement

Institutions of higher education are positioned at the front of the aging workforce boom. Between 2000 and 2010, the number of professors over the age of 65 doubled and their median age surpassed all other occupational groups (Figure 1; U.S. Bureau of Labor Statistics, 2014). Yet, while most campus human resource specialists (HRS) acknowledge this altogether novel workforce trend, few have mobilized and made a concerted effort to modify institutional policies and programs to support the continued engagement of aging faculty, or to facilitate a mutually agreeable exit from the workplace (Duranleau & McLaughlin, 2014; Kaskie, Leicht, & Hitlin, 2012).

This forum addresses the challenges presented by an aging academic workforce, and reviews institutional policy and program modifications that respond to the needs and preferences of older faculty. The discussion largely draws on the findings from a multiyear project funded by

the Teachers Insurance and Annuity Association – College Retirement Equities Fund (TIAA-CREF) Corporation “*Successful Aging in Academic Institutions*” in which surveys were fielded from HRS representing 187 institutions of higher education, interviews were conducted with 18 human resources experts, eight focus groups were convened with faculty and staff from campuses across the country, and 3,234 faculty and staff from the University of Iowa completed a survey about age-related needs and preferences (Andersson, Walker & Kaskie, 2015; Kaskie, Chambers, & Boevers, 2013; Kaskie, Walker, & Andersson, 2015; Kaskie et al., 2012). To our knowledge, the challenges presented by the aging professorate have not received much attention in the peer-reviewed literature, and this forum may help illuminate some of the best policy and program modifications from empirically based perspectives.

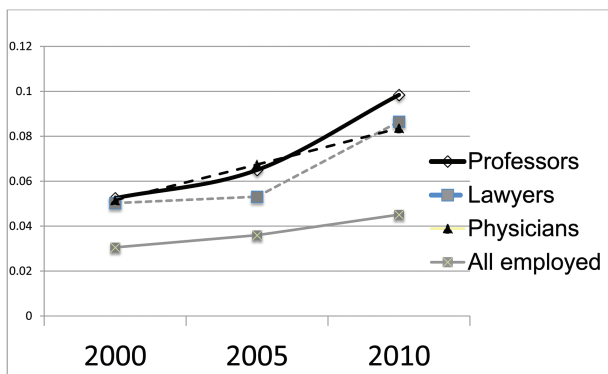


Figure 1. Proportion of employees over 65.

The Aging Professorate

Several factors have contributed to the aging of the academic workforce. Significant increases in life expectancy and health span have resulted in a steady increase in the number of persons, including faculty, who have reached and surpassed their 65th birthdays and remain in the workforce (Crimmins et al., 2010). Moreover, faculty generally enter older age in better health and are less likely to stop working because of a disease or disability (Hayutin, Beals, & Borges, 2013). Some faculty report having greater levels of financial uncertainty in terms of future health care costs, and continue working beyond the traditional retirement age when individuals can begin collecting Social Security and Medicare benefits. They also continue working to accumulate a sufficient amount of retirement savings (Helman, Greenwald, Copeland, & VanDerhei, 2012; Yakoboski, 2015). Others work to accumulate wealth (Kaskie et al., 2012).

Institutions of higher education also offer desirable employment environments, and faculty report higher levels of personal satisfaction and a greater sense of purpose (American Council on Education, 2011). Yakoboski (2015) surveyed 741 tenured faculty aged 50 and older, and found the enjoyment and fulfillment provided by academic work was a leading motivator among most faculty who plan to work past the age of 70. Still, a principal driver of the aging academic workforce concerns how the professorate is no longer subject to mandatory retirement (American Council on Education, 2011; Clauss-Ehlers & Pasquerella, 2014; Pencavel, 2004). In 1986, the Age Discrimination in Employment Act (ADEA) was amended so that, starting in 1994, academic institutions could no longer impose mandatory retirement on tenured faculty. The effects of this sunset were immediate and pronounced. Ashenfelter and Card (2002) found the retirement rate of faculty who were 70 years or older was 75% in 1990 but dropped to just 30% 10 years later.

An aging faculty certainly can be an asset to the institution. Seasoned faculty offer experience-based knowledge, operational continuity, and social capital (AARP, 2006; Paullin, 2014). They also serve as mentors for the next generation of faculty; they may be more likely to secure large,

competitive grants and contracts; and some may contribute to upholding institutional reputations through research and service. Still, these assertions largely stand as untested hypotheses (Pencavel, 2004).

The Challenge Presented by an Aging Professorate

In his survey of 741 tenured professors, Yakoboski (2015) found two of every three expected to work at least up until or past the age of 70 and 75% wanted to do so mostly because they enjoyed their work and had not identified any compelling reason to leave the academy. Indeed, Brown (1997) suggested the conferral of tenure entitles faculty to an individual property right not to be taken back by the institution, and Clauss-Ehlers and Pasquerella (2014) argued that tenured faculty self-define the nature of their workforce participation.

Interestingly, even though they have been left to create their own retirement pathways, only a minority of faculty actually have looked much further into pursuing alternatives to remaining inside academic institutions (Duranleau & McLaughlin, 2014; Kaskie et al., 2012). The collective imagination seems to perpetuate the notion that there are few paths for leaving the academy and there are few places to go. Most often, the departure only occurs when each faculty member individually determines the right time to head directly into retirement. Perhaps more alarming, many faculty have not engaged in sufficient financial planning to know when they have actually met their retirement savings goals, and thus, may remain in the workforce because they are hesitant to forego the opportunity to accumulate salary and benefits. Ciccotello, Pollock, and Yakoboski (2011) asserted that many aging faculty have moved into an indeterminate state of being “reluctant retirees.”

So what does the continued aging of the faculty mean to any given academic institution? Hearn (1999) reported that institutional leadership often defends the value of their aging professorate without referring to any agreed-upon metric, and the majority of HRS respondents did not identify issues concerning the aging professorate as a campus priority. Yet, it could be argued that the aging faculty represents a considerable institutional challenge, particularly in terms of salary and benefit obligations. For example, Alemayehu and Warner (2004) found that employees over 65 incur nearly half of all institutional expenses for health care, and Feinsod and Davenport (2006) reported that older employees consumed health care expenditures at a rate from 1.4 to 2.2 times higher than their younger counterparts.

More important, as faculty salary and benefit payouts rise with age, corresponding increases in productivity are less certain (Amey & VanDerLinden, 2002). Kaskie and colleagues (2012) analyzed data from the 2004 National Survey of Post-Secondary Faculty and plotted the productivity of 17,695 tenured faculty in terms of classes taught and publications. As presented in Figure 2, there was an age-associated curvilinear trend in which productivity numbers

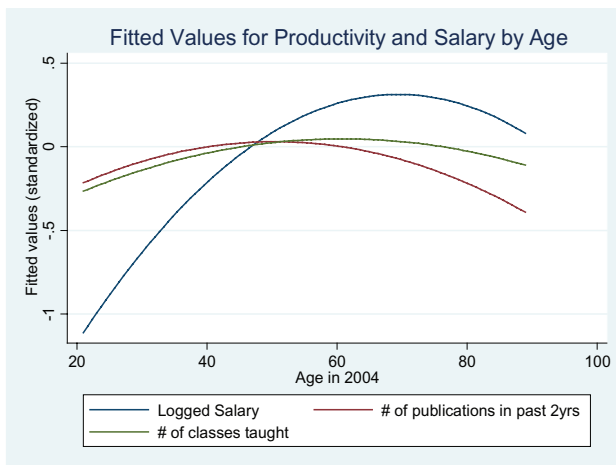


Figure 2. Fitted values for productivity and salary by age. $N = 17,635$. Data retrieved from National Study of Postsecondary Faculty.

steadily increased until age 40, remained constant between the ages of 40 and 60, but then took a downturn thereafter with an increasing amount of performance variability among older faculty members. Meanwhile, faculty salary continued to increase until age 75, especially among those who transferred into administrative roles. Although it certainly can be argued any older faculty member can be just as productive and beneficial to the university as a younger counterpart, aging faculty as a group have an increasing amount of performance variability—a finding consistent with others who have analyzed the costs and benefits of an aging workforce (Hirshorn & Hoyer, 1994; Parnes & Sommers, 1994; Stein, Rocco, & Goldenetz, 2000).

The costs of maintaining an aging professorate have been linked with other institutional challenges such as an increasing need to raise student tuitions or request federal and state subsidies to offset rising salary and benefit payouts (Ginsberg, 2011). Moreover, the continued employment of tenured faculty has been tied to the reduction in new tenure lines and the expansion of less desirable adjunct positions (Cassuto, 2011; Kezar, 2014). A less perceptible problem posed by aging faculty relates to how some aging members have perpetuated cultures and climates detrimental to some younger employees. For example, some academic institutions have lagged in fully implementing family friendly policies and programs, perhaps because senior faculty did not assign an appropriate value to policies not in place during their child raising years when female faculty were fewer in number (Ward & Wolf-Wendel, 2012).

The Faculty Are Aging in Place

With the arrival of America's baby boom generation into old age, the impact of workforce aging on academic institutions whether defined as a benefit, a cost or some combination thereof will become more pronounced. Cameron and Forman (2014) reported that the average age of faculty

retirement at the University of Washington increased from 65.6 in 2001 to 69.5 in 2011. At the University of Iowa, the average age of all retirees was observed to be trending upward, increasing from just over 65.3 in 2005 to 66.1 in 2013 with faculty retiring at an average age of 68.6. Moreover, while most of the faculty anticipated they would retire at 70, more than 6 out of every 10 indicated they would stay longer if they remain healthy and do not find anything more desirable to do, or experience a significant change that necessitates they continue to earn income (e.g., a downturn in pension value, need for long-term care).

Not only are faculty getting older, they also are becoming more prominent on campus. Between 2005 and 2013, although there was an average yearly growth of 8.5% in the number of retirements from the University of Iowa, there was a 10.3% increase in the number who turned 65 each year during this same period. As such, the percentage of those over 65 who were eligible but actually retired steadily decreased from 24.7% in 2005 to 16.9% in 2013. Singh and Stanton (2014) of the University of California, Davis observed a similar change in the retirement to replacement ratio.

What is perhaps most alarming about all this is how few HRS actually considered the issues pertaining to the "aging workforce" as an institutional concern—even though aging employees assume an increasingly large portion of salary payout obligations, consume a higher proportion of benefits, and play a critical role in opening up new jobs and restaffing others. Instead, leaders in higher education appear disposed to focus on how traditional sources of revenue have not kept up with increasing institutional costs (Kimball, 2014), and they turn their attention to other issues that directly impact revenue such as the decreasing public commitment to secondary education, enrollment variations, and global trends in higher education (American Council on Education, 2011; Ginsberg, 2011; Kezar, 2014).

Perhaps the aging workforce receives comparatively less attention because campus leadership, many of whom are over 60, considers any sort of mobilization on these issues as a potential threat to its own individual utility, defined as being able to remain employed in a desirable role and collect salary and benefits independent of institutional costs (Kaskie et al., 2012). In an effort to illuminate this notion, Kaskie and colleagues (2015) considered the three stage model of institutional change (Kezar, 2007; Kezar & Sam, 2013) and determined the extent to which campuses have mobilized a response to the challenges and opportunities presented by an aging workforce. They found only one out of every eight (12%) institutions reached a mature stage of policy and program modification. In contrast, most institutions did not do much more than take a piecemeal approach to accommodating and transitioning aging employees, and the policies and programs that have been modified appeared to have been created at different points in time, by different parts of the campus (e.g., office of the provost, recreational services, university benefits), and in response to differing circumstances

(e.g., to alleviate an immediate budget challenge). The academy certainly seems to be aging in place, and modifications to the institutions in which faculty go about their work will become increasingly important in the decade ahead.

Institutional Policy and Program Modifications

Most universities and colleges have taken at least one or two steps toward modifying policies and programs most relevant to the aging workforce. One common approach has been to offer early retirement incentives (Pencavel, 2004). From an institutional perspective, there has been little resistance to offering such a program as salaries and benefits that would have been earned are recouped, and the positions vacated by senior faculty often are replaced at lower costs with adjunct and other nontenured positions, if at all (American Council on Education, 2011; Kaskie et al., 2012; Kezar, 2014).

When the University of Iowa offered an early retirement program in 2010, the number of retirees nearly doubled from the previous year just as it had when the university last offered early retirement in 2004. Both times, the offer of early retirement resulted in an initial reduction in total salary outlays the following year, but long-term impacts were less clear. For example, after analyzing patterns for the 3 years following the early retirement offer, workplace exit rates actually fell below the pre-2010 averages suggesting that the early retirement program only slightly altered exit patterns of those who were about to retire anyway. Further, given that the employee survey revealed that less than one out of eight faculties even considered early retirement as a viable pathway, this approach does not appear to resolve the long-term challenges presented by an entire cohort of aging workers (Kaskie et al., 2012).

Some academic institutions have implemented post-tenure faculty reviews to promote growth and productivity (Lahey, 2005). However, Wood and Johnsrud (2005) did not find much evidence that post-tenure evaluations were effective in increasing productivity or changing retirement preferences. At this point, it is worth recalling that Ciccotello and colleagues (2011) found that salary raises and other incentives created little to no direct impact on the retirement decisions of most senior faculty.

Perhaps the most studied response to the challenges presented by the aging faculty pertains to the reduction in the number of new faculty offered tenure track positions. Kezar (2014) depicted how the composition of faculty has steadily shifted from tenure to nontenure positions over the last two decades, so now more than 70% of all faculty currently working in post-secondary education are nontenured. By denying newly hired faculty a lifetime guarantee of work, institutions have regained control of faculty hiring, firing and retiring, and more specifically, have gained the ability to control salary and benefit payouts. How this shift in the faculty model impacts institutional missions to educate, create knowledge and serve has been of great concern (Baldwin & Wawrzynski, 2011; Duranleau & McLaughlin, 2014).

Best Practices in Policy and Program Modification

So what should modifications look like? Arguably, institutional leadership must first recognize that an aging workforce, like an increasingly female or racially diverse workforce, presents unique challenges and opportunities that require formal consideration (Ward & Wolf-Wendel, 2012); alternatively, leadership should at least recognize that ignoring or remaining silent about the needs of an aging workforce can come at a considerable institutional expense.

Once campus leadership has mobilized a change process, an institution should look to modify a range of policies and programs that support the continued health and productivity of the increasing number of those employees who continue working past age 65—individuals who are more likely to have increased health concerns, elder caregiving responsibilities, and need for workplace accommodations (Andersson et al., 2015; Clauss-Ehlers & Pasquerella, 2014; Kaskie et al., 2012). In addition, institutions should consider ways to encourage aging employees to learn more about how to make a successful transition from work into retirement, especially considering the large number of faculty who are reluctant to retire because they have never actively explored desirable alternatives to working inside academic institutions or do not have sufficient financial literacy about their retirement (Ciccotello et al., 2011; Yakoboski, 2015). Arguably, by supporting a holistic set of targeted modifications, academic institutions may be more likely address the challenges presented by an increasing number of faculty who continue to age in place inside institutions that have not been modified accordingly (Van Ummerson, 2014).

Health and Wellness

It is well established that workforce participation among aging employees is largely determined by health status (Pelletier, 2005), and the provision of employer-based fitness and health programs correlates with increased work output, decreased health insurance payouts, and reduced disability leaves (Baicker, Cutler, & Song, 2010). Although participation in such programs can have a positive effect on all workers, institutions also need to develop more targeted responses for aging workers that prevent, manage, or delay the onset of age-related disease and disability (Eyster, Johnson, & Toder, 2008). Such age-relevant programs include fitness classes such as Silver Sneakers and Zumba Lite, health promotion activities focused on preventing and managing diabetes, and programs that provide support for elder caregivers (Andersson et al., 2015; Geotzel, Ozminkowski, Villagra, & Duffy, 2005; Moher, Hey, & Lancaster, 2005). Moreover, offering access to these programs may not be sufficient. The results of an employee survey conducted at the University of Iowa (Kaskie et al., 2015) indicated that less than 30% of faculty and staff over age 50 were aware of age-relevant campus-based fitness options.

Comprehensive Retirement Counseling

Comprehensive retirement counseling offers information about retirement savings and benefit payouts, health and long-term care insurance, family and social support issues, and the psychological aspects of retirement (Masterson, 2011). Comprehensive counseling services also can promote skill development and job training to help aging workers navigate the transition from full time work into other roles including part time work, second careers or meaningful civic engagement (Kaskie, Imhof, Cavanaugh, & Culp, 2008; Masterson, 2011). While most campuses host companies such as TIAA-CREF that offer financial counseling services, they engage in few efforts to address the nonfinancial aspects of work and retirement (Masterson, 2011).

The employees at the University of Iowa reported the most common sources of information about retirement came from friends and colleagues rather than a trained professional. Moreover, the Iowa survey revealed less than half of the faculty were aware of campus-based retirement counseling programs. As such, few of the Iowa faculty appeared to formally plan and prepare for what else they might do outside of the institution. Yet, 70% of the faculty and staff over 50 reported that they wanted to increase their use of retirement counseling services in the next 5 years and 80% indicated they hoped such programs would be available by the time they consider retirement options. Such shortcomings in the access to and use of campus-based retirement counseling programs have been noted elsewhere (Duranleau & McLaughlin, 2014).

Pathway Options

Older workers should be offered a variety of alternatives to transition out of full-time positions. These can include flexible or seasonal scheduling, job sharing, telecommuting, or phased retirement. One particular effort to provide such accommodations for aging academics was conducted by the University of North Carolina (Clark, Ghent, & Kreps, 2001). Until 1996, UNC had no formal mechanism to reduce the workload of full professors in a way that corresponded with their decreased productivity or preference to leave the workplace gradually. As such, even though aging professors may have preferred to work in part-time positions, they rarely volunteered to do so because moving to part-time, as it was structured, resulted in a significant reduction in their pension payout. In response, UNC developed a phased retirement program that allowed full-time professors to move into part-time positions without penalty to their pensions. The program was observed over a 2-year period and researchers found while the number of faculty who transitioned from full-time status to full-time retirement remained constant, there was a significant increase in the number of full-time faculty who chose to enter the phased retirement program. The researchers indicated that if the phased retirement were not offered, the professors would have remained in full-time positions.

At the University of Iowa, less than 10% of all faculty over the age of 65 have opted for a phase out schedule, even though general labor force trends indicate the typical proportion of older workers currently on phase outs can be as high as 20% (Gorodnichenko, Song, & Stolyarov, 2013) and more than 25% of the faculty over 50 at the University indicated they were “very interested” in moving onto a phase out schedule. Others (Cameron & Fortune, 2014; LaFarge & Foster, 2014) have shown that faculty has been quite responsive when such varied pathway options are offered.

What Steps Can Be Taken to Modify Institutions of Higher Education?

In an effort to identify variables associated with institutions that have reached a more advanced stage of policy and program modifications, Kaskie and colleagues (2015) fitted a structural equation model in which the quality of campus wellness programs, counseling services and workplace accommodations were associated with three variables: (a) institution size, (b) tenured to non-tenured faculty ratio, and (c) the number of staff assigned responsibility for age-related programs. Certainly, the resources needed to administer, finance and manage policies and programs may be more readily available on larger campuses, and the implementation of age-related efforts may be more easily adapted given an established bureaucratic structure that previously has been relied upon to mobilize other issues such as those pertaining to campus diversity or equity (Kezar, 2007; Kezar & Sam, 2013).

It also may be that tenured faculty themselves play a critical role in carrying age-related issues forward because this faculty tends to be older, and as such, may be more aware of age-related challenges and appropriate policy and programmatic responses. From such a structural functionalist perspective (Hargens & Long, 2002), these particular findings suggest that the likelihood of modifying age-related policies and programs should increase as the academic labor force becomes older.

The most salient (and actionable) finding concerned the importance of having a HRS who completed some training in gerontology and was, completely or in part, dedicated to modifying policies and programs for aging employees. Previously, in studying the role of campus leadership on the implementation of diversity policies and programs, Kezar (2007) found that such dedicated staff can help create campuswide support, coordinate campuswide efforts, and convene routine meetings as to assure development of policies and programs. Appointing staff with a clear understanding about the “big picture” concerning the challenges being presented by an aging workforce, and who are familiar with age-relevant policies and programs constitutes a definitive step that any institution can make to address the aging workforce.

What are the Costs of Not Making Any Modifications?

Eventually, as individuals continue to age in place inside houses that have not been modified, a negative outcome occurs (Salomon, 2010). Yet, when no modifications are made to institutions with an aging faculty, it does not necessarily mean any individual faculty member experiences a negative outcome. In fact, almost all tenured faculty members over 65 are “generally satisfied” with their current situation (Yakoboski, 2015). Instead, institutions are encumbered. By not addressing this issue, academic institutions, particularly those without large endowments, are likely to experience negative outcomes associated with a workforce that is aging in place—younger faculty have fewer tenure-track opportunities, federal and state contributions are strained, and students pay higher tuition and fees (Wellman, 2006).

Given a typically large state university, it can be assumed that the current faculty makeup may consist of at least 150 tenured members who are over the age of 65 with an average annual salary of \$175,000. It also can be assumed these individuals collect an additional 10% of their income in institutional retirement plan contributions and have health expenditures that average \$5,000 annually. As such, annual payouts at such a university would be expected to total almost \$30 million. Assuming the replacement to retirement ratio at this university held steady at 5% each year for the next decade (e.g., so that the university would have 158 tenured faculty over 65 in 2015 and more than 225 by the year 2025) and benefits as well as health care expenditures increased slightly less than 5% each year, then the annual payout would double and reach more than \$60 million by 2025. Total accumulated outlays during this period would surpass more than \$430 million.

Now suppose the university took a holistic approach to modifying policies and programs most relevant to the aging workforce. These might include: (a) making more explicit linkages between pay increases and faculty productivity (e.g., obtaining research awards) so that those who meet the definition of productivity receive comparatively higher annual salary and benefit increases (e.g., assigning annual increases of 2% or more to more productive faculty and 1% or less to those defined as less productive), (b) engaging faculty and staff in comprehensive retirement counseling so to move a greater percentage of aging employees into a phased retirement program (e.g., reducing the retirement to replacement ratio from 6% to 4% each year), and (c) moving faculty and staff (and retirees) into a capitated health insurance program and implementing age-targeted health and wellness programs (e.g., reduce the annual growth in health care expenditures for aging employees from 5% to 3%).

Initially, as depicted in Figure 3, such institutional modifications would achieve modest results especially if implemented in a piecemeal manner. However, if these modifications were coordinated as a holistic long-term strategy, annual savings

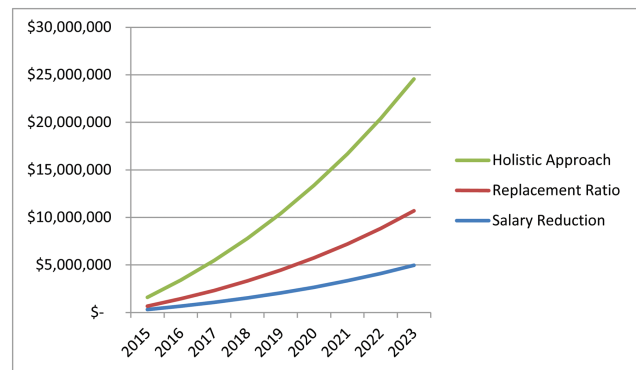


Figure 3. Expected annual savings derived from three different strategies.

would soon surpass \$10 million, and by 2025, aggregate total savings could surpass \$60 million. At this point, it should be noted how these projections rely on reasonably conservative assumptions, were limited only to payouts for tenured faculty over 65, and could come at little expense to the majority of faculty who do not continue to work past the age of 65 for the purpose of accumulating salary and benefits.

It also is important to note that while the conferral of tenure clearly makes faculty separate and distinct from other institutional employees (Brown, 1997), many of these modifications for addressing the challenges presented by an aging faculty may be just as relevant to other aging university employees. For example, like tenured faculty, many of the staff working within academic institutions enter older age in better health and experience financial uncertainties in their retirement. They also enjoy the working environment academic institutions provide, and take great satisfaction in their work. The University of Iowa study also revealed an increasing trend in retirement age among staff (though not as pronounced as the faculty) and a corresponding increase in salary and benefit payouts, accounting for nearly 75% of all campus labor outlays. Most relevant here, the survey results indicated that these individuals would also benefit from modified wellness programs, retirement counseling services, and workplace exit pathways.

Conclusions

The challenges presented by the aging academic workforce have not received much attention in the peer-reviewed literature. In fact, in conducting this research, some senior faculty and institutional leadership offered admonishments about broaching a potentially provocative subject or contended that there was no story here. Still, others encouraged such efforts to illuminate this issue with empirically based, grounded perspectives. In convening this forum, it is hoped that a greater number of gerontologists can engage in this conversation, if only to counter institutional impulses to ignore these issues or resist mobilization. Indeed, participants in this forum can help advance campus conversations

by discussing how a holistic approach to modifying health and wellness programs, retirement counseling services and varied pathway options can ultimately help academic institutions successfully embrace an aging academic workforce.

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