Losing my faculties? Multiple well-beings, retirement and the loss of academic identity and institutional affiliation

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There is an ancient joke around higher education to the effect that old professors never die, they merely lose their faculties. Unfortunately, old professors do die, and in recent years we have experienced a significant loss of academic colleagues through early death as well as early retirement. Having recently been invited to review a book on ‘Becoming an academic’ (McAlpine and Äckerlind, 2009), I found myself reflecting on the necessity for a parallel publication on ‘un-becoming’ (Hodkinson, P. et al. 2007) an academic. On taking up the ‘invitation’ to retire early in 2009, I immediately set about writing a conference paper for the Canadian Association for the Study of the Education of Adults entitled ‘Being displaced: pedagogical identities and early retirement: an autoethnographical account’ (Armstrong, 2009). On reflection, this was an overly negative ‘knee-jerk’ response to what could have been a positive opportunity to focus on issues of well-being. However, as an academic, I came to realise that well-being is multifaceted, and focusing on the well-being of identity was unnecessarily negative, since the transition out of higher education was – it turns out – to be a relatively lengthy process. Professor Barbara Tizard of the London University Institute of Education asks ‘When are retired academics not ...? ... When they continue to work part-time.’ (Tizard, 2000; Tizard and Owen, 2001; Tizard, 2004). There is now a view that ‘retirement is dead’, and that we are all third agers now, spending one-third of our lives post-65.

In this conference paper, I will be examining and reflecting upon what research tells us about retirement – and in particular, early retirement - as a transition, and the opportunities early retirement offers to take up lifelong learning in order to support one’s own well-being through the negotiation of a persistent academic identity, albeit part-time and partial. A recent special issue of Teaching in Higher Education focused on ‘Leaving the academy’. Interestingly, not one of the papers focused on the issues of ‘retiring from the academy’. Instead, stories are told about ‘erosion of academic troth’, the re-theorisation of professional education, boundary crossings,
and making alternative uses of cultural spaces outside higher education. As one of the articles in the special issue suggests, there must be fifty ways to leave your higher education institution. Surely, some of these ways of leaving are more or less conducive to sustaining well-being than other routes out of higher education?

Here, I want to derive an idea from multiple literacies and multiple realities that there are also multiple well-beings. Focus on physical health is an obvious concern since workers typically retire at an older rather than younger age. Having spent several years travelling over 100 miles to work for at least five days per week, there must be benefits for one’s health and welfare by working from home. However, there is also a question of social well-being and having had extensive and regular face-to-face and interpersonal communication with faculty colleagues and students, the reliance on digital technologies for communication may not be an effective substitute experience of sociality. Maybe digital technologies such as Facebook and Skype can help compensate for this threat of reduction of social well-being. This paper will examine recent of research findings on the use of social media in sustaining an academic identity. To some extent this can be considered primarily as a question of psychological well-being. In my previous paper on retirement (Armstrong, 2009), this was certainly my pre-occupation – the loss of academic identity and institutional affiliation. As recognised by Hartman (2009), this is also a struggle to retain one’s intellectual, social and cultural capital. Hartman has reflected upon strategies for enabling academics to be able to retain intellectual capital following retirement. She notes that ‘colleges and universities have always dealt with the retirement of their oldest and most experienced professors and their replacement by younger cohorts, but the acceleration of this trend in the coming years could put many academic institutions under unusual stress.’ (Hartman, 2009, 384). Access to library resources ought to be relatively unproblematic for those academics who retire, especially in this digital age. In theory, retired academics should be able to continue to access library resources at little additional cost to the higher education institution. However, as I discussed in my previous paper, a condition of my early retirement was that I could continue to use the university email system, and I could continue to access the library resources, including access to electronic journals – but I was not permitted to do this from home. Instead, I would have to travel to the library itself, undertaking a journey in excess of 100 miles, as mentioned previously. I was made aware of
status difference here – had I achieved the status of professor, I would have been given emeritus status, including access to electronic resources from home and – perhaps somewhat paradoxically – office space in the university. Retirement for academics can be characterised by structural inequalities that facilitate or inhibit continued engagement with academic and professional intellectual activities, including research and writing for publication. Keeping up to date with academic research is much more problematic following retirement, and if one wishes to continue to teach on a part-time basis accessing up to date textbooks is essential, although accessing journal articles is more important for ensuring teaching is informed by current intellectual developments and research findings.

As it turned out, since early retirement I have taken on two or three part-time teaching opportunities, which have given me access to the library resources of three higher education institutions. Moreover, this portfolio of part-time teaching has helped me retain a degree of intellectual capital and my academic identity. I was also fortunate to be offered the opportunity to undertake research for a project on widening participation, which allowed me to continue to practice my academic research skills, and given the responsibility to write the research report, which extended my retention of intellectual capital for a while at least.

In the research literature, there is a conception of retirement as a *transition*. I suspect that having a portfolio of part-time teaching means that I am still in a transitional state in terms of retirement. As outlined in my previous paper on early retirement, the commencement of the transition was fairly rapid. For many years in higher education, I was comforted by the fact my birthday is at the beginning of the academic year, and that the rule for retirement was the end of the academic year in which one attains the age of 65. This meant that I would be nearly 66 years of age when I retired. I was not predisposed to retire early, and after a few weeks of negotiation, a couple of consultations with Human Resources, and a fruitless discussion with my trade union, I found myself faced with losing the affiliation with a university, and my academic identity. This was at a time when discussions in the UK were considering raising the age of retirement, and when there was a European Employment Strategy which set a goal of raising the retirement age of workers in the EU, through a strategy of ‘active ageing’, which appealed to me, since the policies
focused on ‘combining better labour market integration of older workers with increased participation in lifelong learning, including learning into the Third Age, and this was seen as a ‘core pillar’ in both the Lisbon Strategy as well as the European Employment Strategy (Eichhorst, 2011, 107). This, it needs to be said, has more to do with financial well-being of the European economies, than the economic well-being of those retiring. In any case, other evidence suggests that older workers are less likely to take up training opportunities, since it is considered less of an investment, and offers lower net returns. The average participation rate in on-the-job training of workers aged 55 or over is less than eight percent across the Economic Union. According to Fouarge and Schils (2009), this is consistent with human capital theory that predicts ‘investments in human capital are a way to increase productivity and thereby enhance job, employment, and income security’. However, for older employees, there are perceived to be fewer benefits of training when approaching retirement age, and where early retirement is an option, this investment is even less attractive. The evidence offered by Fouarge and Schils confirms that early retirement lowers the return on investment in human capital. They found that training participation of older workers is lower in European countries with generous early retirement systems; yet, other evidence suggests that increased participation in on-the-job training of older workers can prolong their working lives. Research carried out by Truluck, Kim and Valentine in the United States indicates the demography of retirement is similar to European countries, with life expectancy ‘around 78 years of age and rising’. This means that ‘older adults are able to enjoy their later years through their 80s and even into their 90s’ (2010, p.31). The authors note that in the USA the ‘educational level of older adults has also increased. In 2006, nearly 73% of adults aged 65 and over completed high school education, and nearly 20% had bachelor's degrees or higher. Trulock et al suggest that this increase in educational achievement of older adults is a factor in the increased interest in educational participation of older adults. Indeed, research by Merriam, Caffarella and Baumgartner (2007) has shown that prior educational participation is the best predictor of interest in and continued participation in educational activities.’(Truluck et al., 2010, p.31). In North America, there are more than 260 ‘institutes for learning in retirement’ in colleges and universities. This research also analysed their data on the basis of age and gender. One finding was that women thought that activity/interest groups were more important than men; women were
more likely to participate in such learning. This is consistent with the Fouarge and Schils’ study undertaken in Europe, which found that older women have a higher probability of being engaged in training than older men (2009, 103). They conclude that ‘at older ages training is used to compensate for low human capital’.

Working in the public sector, with the current policy re-directions in the management of pension funds, there is very much an issue if financial and/or economic well-being. In the case of early retirement, even with what are seen by higher education institutions as ‘generous’ settlements, there remain questions about one’s economic well-being. It has been argued that there is an ‘early retirement gap’. The research on economic well-being indicates that people are living longer, healthier and wealthier. The concept of the ‘Third Age’, rather than old age, challenges the negative connotations of retirement, since one-third of the UK population apparently lives one-third of their life after the age of 65. Life expectancy in the UK has increased from 70 to somewhere near 80 or even higher. According to the Office of National Statistics in 2010, the average life expectancy at birth across the UK, for both women and men, rose by another four months to 78.2 for men and 82.3 years for women. It is worth noting the widening gender difference - the average life expectancy at age 65, for both men and women, rose by two months. The ONS figures also revealed a widening gap between areas with the lowest and highest life expectancies. The gap between the local areas with the highest and lowest life expectancies increased between 2004-06 and 2008-10. There are significant regional variations. For example, life expectancy was highest in Kensington and Chelsea and lowest in Glasgow City in each period between 2004-06 and 2008-10. (http://www.statistics.gov.uk/hub/population/deaths/life-expectancies/index.html).

A popular myth around retirement is that death soon follows, and is attributed to the loss of identity and purpose. The statistics would need to take into account those who take early retirement due to ill-health. In answering the question whether the sick retire early, Miah and Wilcox-Gok’s examination of the research argue that previous studies do suggest that poor health does lead to early retirement, but fail to look specifically at the indirect impact of chronic illness. They observe that ‘the vast majority of the chronically ill population do not report their general health to be poor’ and ‘nor do they report functional limitations in activities in daily living’ (Miah and Wilcox-Gok, 2007, p.1921). What needs to be taken into account is that during a
long period of illness, those in employment may not accumulate sufficient ‘assets’ by
the age of retirement, and paradoxically need to continue to work and retire later
rather than earlier.

Research on retirement tends to emphasise the reluctance of most people to retire
unless they are chronically ill. We need, of course, to take account of the ‘ever-
changing meanings of retirement’. But the positive side of early retirement can be
emphasised in terms of spending more time with family and friends, undertaking
voluntary work, more time travelling the world, and engaging in lifelong learning
projects. However, as welfare and medical improvements improve well-being, this
poses challenges to economic well-being. A recent ESRC study on *Inequalities in
Health in an Ageing Population: Patterns, Causes and Consequences*, undertaken
by the Universities of Manchester and Central London, and the Institute of Fiscal
Studies have established that there is a relationship between wealth, social class
and well-being. For example, it appears from this study that people from lower
socio-economic groups on average die earlier than their wealthier counterparts.
These people along with those who spent less time in education are, it appears,
more likely to suffer from both self-reported illnesses such as depression, as well as
from long-term conditions such as high blood pressure, diabetes and obesity. The
research has suggested that inequalities in health and life expectancy arising from
socio-economic inequalities persist into the third age, though they are greater for
those in their 50s and 60s, prior to retirement. This research project also discovered
that early retirement is ‘generally good for people’s health and well-being. The
exception, not surprisingly, is when early retirement is forced upon people due to ill-
health or redundancy, rather than voluntary.

There is across continental Europe, if not the world, a trend towards early retirement,
which according to Dorn and Sousa-Poza (2010), has been one of the most
important labour market developments in the past 50 years. They recognise the
important distinction between voluntary and involuntary early retirement. Drawing on
research from 19 industrialised European nations, the most attractive offer of early
retirement is when workers can choose an optimal retirement date that maximises
their post-retirement income. The precedence of economic or financial well-being
over other conceptions of well-being is considered to be an important factor, since
health and welfare, and the more sociological and psychological dimensions of well-being, appear to be dependent on at least a satisfactory level of income, regardless of whether the early retirement is voluntary or not.

The evidence currently suggests that early retirement is linked to economic hardship. This paper argues that this compounds issues around economic or financial well-being, with an increasing percentage of the population living their extended lives in poverty, diminishing the quality of life, and in turn impacting on health, psychological and social well-being. The earlier one retires, the more one relies on having a safe and secure occupational pension scheme, prior to being entitled to the state pension. Isaksson and Johansson (2008) ask whether early retirement is positive or negative for well-being. In their review of current research and their own longitudinal study in Sweden, they concluded that most people were able to adapt positively to early retirement. They were particularly positive when those retiring early were offered financial settlements considered generous. Potocnik, Tordera and Peiro (2010) explored the influence of the early retirement process on satisfaction with, and ability to adjust to, early retirement, and the maintenance of psychological well-being.

Much of the research evidence that supports arguments for and against early retirement has been based on large-scale restructuring in industries. However, higher education institutions have experienced similar restructuring in response to reductions in state grants, and institutions’ abilities to generate fee income. The market for overseas students is now very competitive, and with the enlargement of the higher education sector in the UK, decisions around staffing levels are being determined by economic costs.

Having made this point, this paper will consider some related threats to well-being that stem from economic decisions, and that lead to involuntary early retirement. In higher education, widening participation policies have been successful in increasing participation rates. However, at the same time staffing levels and student contact time, including tutorials have been reduced. The effects are compounded by the effects of both semesterisation and modularisation. This must surely have consequences for the quality of the student experience, and this will impact on student performance. But this is not necessarily a negative impact, for it could be
encouraging more student-centred and autonomous approaches to learning. The professional identity of the university academic is being challenged by pressures to engage in quality assurance procedures including the REF, and before that the RAE, in the UK. More time taken up by accountability and less student contact time continuously challenges the professional identity of the academic. This is can threaten the psychological well-being of the academic, whose role and priorities have been shifting in directions beyond their control.

There may well be significant gender differences here. In my review of McAlpine and Äckerlind’s *Becoming an Academic* (Armstrong, 2011), I became conscious of the privileges I had as a male in higher education. The differential gender experiences of the transition from work retirement and early retirement. Meg Maguire has discussed the experience of women academics as they are coming up to retirement age, or have recently retired at the 2010 BERA Conference. In that paper, Maguire cites Arnot et al. (1999) in support of the view that the marginal position of women still shows a ‘gender gap’, although more women academics have been breaking through the ‘glass ceiling’, that persists with age. Maguire suggests that ‘when it comes to the issue of age and ageism, everyone becomes older and if they are lucky, everyone eventually, becomes old’. However, as Featherstone and Wernick (1995, p. 5) have pointed out, ‘unlike the other social oppositions, youth and old age … are transitional statuses’, and work in a less clear cut way. Maguire (2010) asks: what impact does this ageing process have for women in the academy? Her research indicates that women academics tend to be ‘socially and psychologically located on the margins of the institution’. Does it leave older women still positioned as unequal as they move into and beyond retirement? The research was based on a series of in-depth, semi-structured qualitative interviews with a small sample of recently retired female academics. These women believe that senior female academics have made significant gains during their lifetime working in higher education, with increasing – if not yet equal – opportunities offered/not offered to them in leading up to retirement: ‘gender matters continue to shape their life experiences post-paid work’. Indeed, the general finding is that women are typically less well off in retirement than men, not least because they are likely to have more time in retirement than men (Trewin and Curatola, 2010).
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