The modern view of academic retirement necessitates modern retirement policies and procedures for MSU faculty
[a position statement from the MSU Association of Retired Faculty]

For university faculty retirees, the day after retirement wasn’t different from the day before retirement. The retiree’s knowledge, experience, and professional network were unchanged and, for many retirees, years of continued professional involvement lay ahead. As a group, the retired faculty can look back on a record of major accomplishments. During their academic careers they developed curricula and instructional strategies for the spectrum of education, from K to 12, from BS/BA to PhD and Post-doc training, and for outreach or community education delivered via the web or on-site instruction. Their body of research and creative work has been widely recognized and appreciated. They conceived and articulated the basis of understanding that now guides their branches of learning. They possess unique knowledge and experience that is not immediately replaceable. The university can retain some of that expertise by creating an environment that entices retired faculty to maintain university connections. It is in the university’s interest to cultivate continued professional involvement with its retired faculty.

MSU has made some progress towards integrating its retired faculty into the campus community; e.g., forming of the MSU Association of Retired Faculty (ARF)¹ and providing HR staff to assist faculty members as they transition into retirement. Although some faculty members retire with specific plans that preclude connections with MSU, many would welcome an opportunity to maintain academic connections. On the other hand, a significant minority of retirees indicate that they will refrain from such university connections for various reasons, including belief that the university or the university system treated them unfairly, disrespected them, or wants nothing further to do with them. The causes of such perceptions must be identified and corrected. ARF members conducted an informal survey of retirement policies at other universities to gather ideas that could help MSU improve its relationship with faculty retirees. A clear picture emerged. Research universities believe that involved, connected retired faculty is an important component of their institutions and many have implemented new retirement policies and procedures for building the connections. They view faculty retirement as an ongoing process or transition, not a sudden change on a specific date. Because there are many ways to blend academic activity with retirement life styles, the new policies are flexible enough that retirement can be tailored to the needs, desires, abilities, and wishes of both the individual faculty member and the university.

The modern view of academic retirement necessitates modern retirement policies and procedures. MSU and MUS retirement policies and procedures are out-of-date and deficient in many respects. For both of the MSU retirement plans, TRS and ORP, these retirement policies need immediate attention:

(i) phased retirement,
(ii) retirement incentives,
(iii) post-retirement employment, and
(iv) the bundle of rights, benefits, and privileges accorded retired faculty.

In principle, MSU’s faculty retirement rules are easily fixable by adopting proven successful retirement policies. In practice, however, faculty constituencies need to be educated about retirement policies. It will require a serious, committed effort to sort out the best ideas and craft a mutually beneficial retirement policy. ARF proposes that faculty constituencies convene a collaborative Retirement Policy Work Group (WG). The WG would study the present retirement policies and alternatives, identify and prioritize the main areas of concern, and prepare recommendations. ARF is willing and able to participate on the WG. Ultimately, the recommendations would have to be presented to the appropriate jurisdiction, whether MSU, MUS, or the Montana legislature, with each presentation led by a separate set of faculty representatives, depending on the responsibilities of each faculty body. Success in these endeavors would bring about major changes that not only produce constructive relationships between retired faculty and the university but also improve the morale and retention of active faculty. MSU would become an even greater university.

¹ The MSU Association of Retired Faculty (ARF) was founded in 2004 for purposes of facilitating the continued connection of retired faculty to the university and fostering the well-being of retired faculty and spouses. ARF reports to the MSU Office of the Provost which provides ARF with office space (338 Culbertson Hall) and a modest operations budget. Programs are also supported by membership dues, currently $15/yr. Management, program work, and communication tasks are accomplished by retired faculty volunteers and elected officers. ARF newsletters, web pages, and special public presentations are an important and timely source of information for retirees and active faculty transitioning into retirement, thereby significantly reducing traffic to both MSU and MUS human resource administrators. ARF is the only communal voice for retired university faculty in Montana. When university or state administrators desire a dialogue with retired university faculty, ARF is the point of contact. For example, within the past year, the Director of the Montana Teachers’ Retirement System and the Director of MUS Benefits have come to Bozeman to participate in ARF’s forums. As MSU and state agencies deal with challenging program decisions that affect retired faculty (e.g., the mandate to eliminate unfunded liabilities as measured by new accounting rules), ARF is the unique source for feedback, suggestions, and evaluations from retired faculty. The University of Montana is forming a similar association of retirees (http://www.umt.edu/retirees/).