

Montana State University – Reflection & Feedback Process for Retired Faculty

The *Retired Faculty Reflection & Feedback Process* facilitates communication between the institution and a retired faculty member or retired academic administrator. The purpose is to enable transfer of knowledge and experience from retirees soon after their transition to retirement status and to help the university gather important evaluative information. The process provides a mechanism for identifying mutually beneficial post-retirement links between the university and the retiree.

Retirement Information Form

The Office of the Provost encourages each retiree to submit the on-line Montana State University Retirement Information Form (available on the Association of Retired Faculty web site - <http://www.montana.edu/retired/>). The form lists several available options and services and allows the retiree to select or decline each. The retiree can use this form to accept a *Reflection & Feedback Meeting*. Upon receipt of the completed form, the Association of Retired Faculty (ARF) will transmit requests for options or services to the appropriate ARF teams.

Reflection & Feedback Meeting

By means of the *Retirement Information Form*, the retiring faculty member/academic administrator may request a *Reflection & Feedback Meeting* with a two-person committee comprising a faculty member nominated by the Chair of the Montana State University Faculty Senate and a retired faculty member (or retired academic administrator) appointed by the President of ARF. The two members of the *Reflection & Feedback Committee* for each retiree will be subject to approval by both the retiree and the Provost.

The *Post-Retirement Reflection & Feedback Meeting* will be initiated by the President of ARF within one month after receipt of the completed *Retirement Information Form*. The President of ARF will convey the retiree's request for a reflection & feedback meeting to the Chair of the MSU Faculty Senate. The Chair of Faculty Senate and the President of ARF will: (a) nominate the reflection & feedback committee, (b) secure the retiree's approval and the Provost's approval of the nominated committee and (c) appoint and direct the committee to conduct the meeting. The reflection & feedback meeting will take place no later than one year following the official date of retirement. The reflection & feedback committee will submit a written summary of the reflection & feedback meeting to the President of ARF within 2 weeks after the meeting.

Annual Report of Data from Reflection & Feedback Meetings

Information from the retired faculty reflection & feedback meetings completed during each fiscal year will be aggregated and compiled into a formal annual report. The report will be prepared by a committee appointed by the President of ARF. The report will be submitted to the President, Provost, and Faculty Senate of Montana State University. The report will not disclose the names of the retirees who participated in reflection and feedback meetings.

Rationale – Reflection & Feedback from Retired Faculty

The reflection and feedback meeting enables transfer of knowledge and experience from newly retired faculty and administrators. Many universities have found that retired faculty and administrators are delighted to share their knowledge, help their successors, and offer suggestions. The reflection and feedback process potentially yields useful information about the university, including an assessment and suggestions for improving the quality of the university. Experience indicates that retired faculty and administrators generally are more forthcoming, constructive, and objective than when actively employed. Perhaps because they are liberated from university politics and promotion & tenure policies or because they have more time to contemplate the issues, retirees are willing to provide more candid, objective feedback than during annual evaluations. The many reasons for instituting the Reflection and Feedback Process for Retired Faculty include:

- *It will help to support the university's reputation as an excellent employer. A process for gathering information from retirees is viewed as an indication of effective personnel management. Exit information sessions are advocated by professional institutes and accrediting bodies concerned with quality management of people and services.*
- *By soliciting critical evaluations and suggestions, it shows that the university is dedicated to improved quality and efficiency.*
- *It will identify previous decisions and strategies that proved successful and elicit suggestions for new academic enterprises that are ripe for development at Montana State University.*
- *It will identify retirees who wish to remain professionally active within the university community. Many faculty members retire because of the aging process and the resulting loss of physical strength and energy, not because they have lost enthusiasm for teaching, learning, research, service and/or technology transfer. The university supports and facilitates its continued association with such retirees.*
- *Excellent people sometimes seek early retirement, perhaps planning to move to a different university. If university policies make it difficult for them to attain their professional goals here, the issues they describe during the reflection and feedback meeting may help the university adjust policies to improve retention.*
- *It will encourage the transfer of knowledge, contacts, insights, and experience from the departing faculty to successors and the institution. Most retirees are happy to help, if the university provides a suitable mechanism. The reflection and feedback meeting has proven to be an efficient knowledge transfer method.*
- *It will provide an opportunity to assuage disgruntled retirees. Because the retired faculty reflection and feedback process demonstrates an appreciation for retirees' knowledge and experience, they may leave with a more positive, possibly cooperative, attitude towards the university.*

Committee Preparation for a Reflection and Feedback Meeting

The meeting is conducted in a casual atmosphere at a time of mutual convenience. The committee's job is to facilitate communication and bring out honest, candid evaluations.

At the commencement of the meeting, let the retiree know that the university respects the retiree's opinions and appreciates the retiree's willingness to share his/her observations and ideas. Employ conventional procedures such as: arrange a suitable time and place, avoid interruptions, take notes, and be aware of the body-language and feelings of the retiree. Follow the established process for recording and reporting information from the reflection and feedback meeting.

For many universities, retirees provide an important source of high yield development ideas and opportunities. The potential value of feedback from MSU retired faculty is justification for a serious approach.

The following are suggestions for managing the meeting:

- *Listen rather than talk.*
- *Give the retiree time and space to complete a thought.*
- *Understand without necessarily agreeing.*
- *Keep calm, resist the urge to defend, argue, or impose your own ideas. Your task is to record faithfully the retiree's information, constructive criticism, and suggestions.*
- *Identify decisions, policies, or strategies that worked well in the opinion of the retiree.*
- *Ask open (what/how/why) questions not closed (yes/no) questions when you require confirmation about a point.*
- *"Who" questions should be used with care to avoid the appearance of witch-hunts. For example, many retirees will be uncomfortable if asked to name people or allocate personal blame. The relevant information is not about blame, the allocation of which usually is not constructive. Very serious complaints/accusations should be followed-up with appropriate institutional authorities by you and the ARF Reflection and Feedback coordinator.*
- *Be sure the retiree knows that assistance and information about most retirement issues are available through ARF and MSU Human Resources.*
- *Invite the retiree to be an active member of ARF (no dues the first year of retirement).*

Retiree Preparation for the Reflection and Feedback Meeting

The retiree may discuss any relevant topic, including policies, procedures, administration, teaching, research, service, technology transfer, outreach, the retiree's desires concerning continued affiliation with the university, and the retiree's concerns about retirement. The following are suggestions for use by the retiree in preparing for the meeting:

- *Identify basic information that you would like to convey; e.g.,*
 - What are your reasons for retiring?
 - What were the strengths of the university that you would like to see continued or enhanced?
 - What could the university do better?
 - Are there any circumstances under which you would like to return to the university?
 - Did you enjoy the working conditions? If not, what steps can be taken to improve them?
 - What else should the university hear in order to benefit from your knowledge and experience?
 - What additional assistance or information do you need during your transition into retirement?
- *Prioritize the various issues you would like to discuss so that you can focus on the most important and easily implemented suggestions.*
- *Prepare, perhaps by making a list to which you can refer during the meeting. It might feel awkward, but it's better to give a concise, prepared statement than to forget important ideas. Some retirees bring to the meeting a draft report for the committee's use.*
- *How much you offer during the conversation depends on what you have to say. By sharing your insights and suggestions for improvement, you can help the university enhance the workplace for your working colleagues. If you have negative comments, keep the tone professional and constructive.*

The reflection and feedback meeting is an opportune time to identify policies, programs, decisions, etc., at MSU that you consider especially noteworthy, in either a beneficial or detrimental sense. It is not unusual for retirees to have mixed emotions when leaving a university position. It is important to engage in a professional and intellectual conversation that produces constructive criticism "for the record." This process provides an opportunity to provide candid feedback, while departing the campus on a positive note.

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