Montana State University Retirement Assistance and Exit Interview Process
[http://www.montana.edu/retired/arprocess.htm]

The Retirement Assistance and Exit Interview Process of Montana State University is a formal process for facilitating communication between the institution and a retiring faculty member or retiring academic administrator. The purpose is to enable transfer of knowledge and experience to and from retirees during their transition to retirement status. The process provides information for helping retirees cope with retirement policies and procedures and for helping 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. Upon receipt of the completed form, the Association of Retired Faculty (ARF) will transmit requests for options or services to the appropriate providers.

Retirement Assistance
The Retirement Assistance component of the process will be initiated by ARF members soon after receipt of a request from the retiring faculty member or retiring academic administrator. The ARF web site contains extensive information about retirement, the retirement process, and retirement planning.

Post-Retirement Exit Interview
By means of the Retirement Information Form, the retiring faculty member/academic administrator may request a face-to-face Post-Retirement Exit Interview. The exit interview will be conducted by a two-person committee with the following representation: (1) faculty member nominated by the Chair of the Montana State University Faculty Senate and (2) retired faculty member or retired academic administrator appointed by the President of the MSU Association of Retired Faculty. The two members of the Post-Retirement Exit Interview Committee for each retiree will be subject to approval by both the retiree and the Provost.

The Post-Retirement Exit Interview 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 an exit interview to the Chair of the MSU Faculty Senate. The Chair of Faculty Senate and the President of ARF will: (a) nominate the interview 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 interview. The interview will take place no later than one year following the official date of retirement. The Post-Retirement Exit Interview Committee will submit a written summary of the exit interview to the President of ARF within two weeks after the interview.

Annual Report of Data from Retirement Information Forms and Exit Interview Results
Information from the Retirement Information Forms and the Post-Retirement Exit Interviews completed during each fiscal year will be aggregated and compiled into a formal Annual Report of Retirement Information and Exit Interview Results. 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 submitted retirement information or were interviewed.
Rationale for the Retirement Assistance and Exit Interview Process

The process indicates that Montana State University provides a caring, compassionate, and open professional environment. The offered retirement assistance will help make the retirement transition process as understandable and non-traumatic as possible. Exit interviews are an opportunity for the university to enable transfer of knowledge and experience from the departing faculty and administrators. Many universities have found that retired faculty and administrators are delighted to participate in exit interviews, share their knowledge, help their successors, and offer suggestions. Exit interviews yield 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 staff still in their jobs. Perhaps because retirees are liberated from university politics and promotion & tenure policies, they are willing to provide more candid, objective feedback than do employees when interviewed during annual evaluations. The many reasons for instituting the Retirement Assistance and Exit Interview Process include:

- It will help to support the university’s reputation as an excellent employer. Retirement assistance and exit interviews are viewed as positive indicators of effective personnel management. Exit interviews 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 exit interview 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 exit interview has proven to be an efficient knowledge transfer method.
- It will provide an opportunity to assuage disgruntled retirees. Because the exit interview process demonstrates an appreciation for their knowledge and experience, they may leave with a more positive, possibly cooperative, attitude towards the university.
Interviewer Preparation for an Exit Interview

Exit interviewers must understand that retirement is a traumatic experience for many academic professionals. The Montana State University Retirement Assistance and Exit Interview Process is an effort to make the transition to retirement as comfortable and rewarding as possible. Face-to-face interviews facilitate communication and bring out honest, candid evaluations. Exit interviews are inherently emotional and they require sensitive and mature management, especially if interviewees are anxious or volatile.

Prepare for the interview. Anticipate topics about which the retiree has specific experience and knowledge. 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 interview procedures such as: (a) arrange a suitable time and place, (b) avoid interruptions, (c) take notes, (d) be aware of the body-language and feelings of the retiree and (e) adjust your approach as necessary. Follow the established process for gathering and reporting exit interview information.

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 interview:

- *Listen rather than talk.*
- *Give the retiree time and space to complete a thought.*
- *Interpret, reflect and understand without necessarily agreeing.*
- *Keep calm, resist the urge to defend, argue, or impose your own ideas. Your task is to record 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. Exit interviews are 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 exit interview coordinator, outside of the exit interview process.*
- *Be sure the retiree knows that assistance and information about many retirement issues are available through ARF and MSU Human Resources.*
Retiree Preparation for the Exit Interview

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 Exit Interview:

- **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 interview.** It might feel awkward, but it’s better to give a concise, prepared statement than to forget important ideas.

- **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 exit interview may seem like a good opportunity to off-load frustrations that were held back for years, but this conversation isn’t time for a harangue. It is not unusual for retirees to have mixed emotions when leaving a university position. It is important to control those emotions. 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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