

# Scoping Review of Academic Retirement

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## Rationale

- The number of academics reaching traditional retirement age has been increasing worldwide.
- Academics provide unique contributions to society and have unique work and retirement trajectories; therefore it is important to understand the nature of their perceptions and experiences with retirement.
- These insights will help us understand retirement pathways that enhance the transition for academics and strengthen understandings of retirement from professions with generally high autonomy.
- This study offers the first scoping review of the nature and quality of the literature on academic retirement including quantitative, qualitative, and potentially mixed-methods research.

## Objectives

- Explore the nature and quality of the empirical literature on perceptions and experiences with retirement among academics.
- Provide a broad and diverse perspective by integrating findings.
- Examine the existing literature, offering insights and recommendations for academia and policymakers to support academic professionals.

## Methods

- **Literature Search:** Health, education, gerontology, and multi-disciplinary databases were searched for literature related to academic retirement.
- **Screening Process:** A two-step screening process was deployed, first title and abstract then full text. Each article was screened by two independent researchers, and conflicts were resolved by a third person.

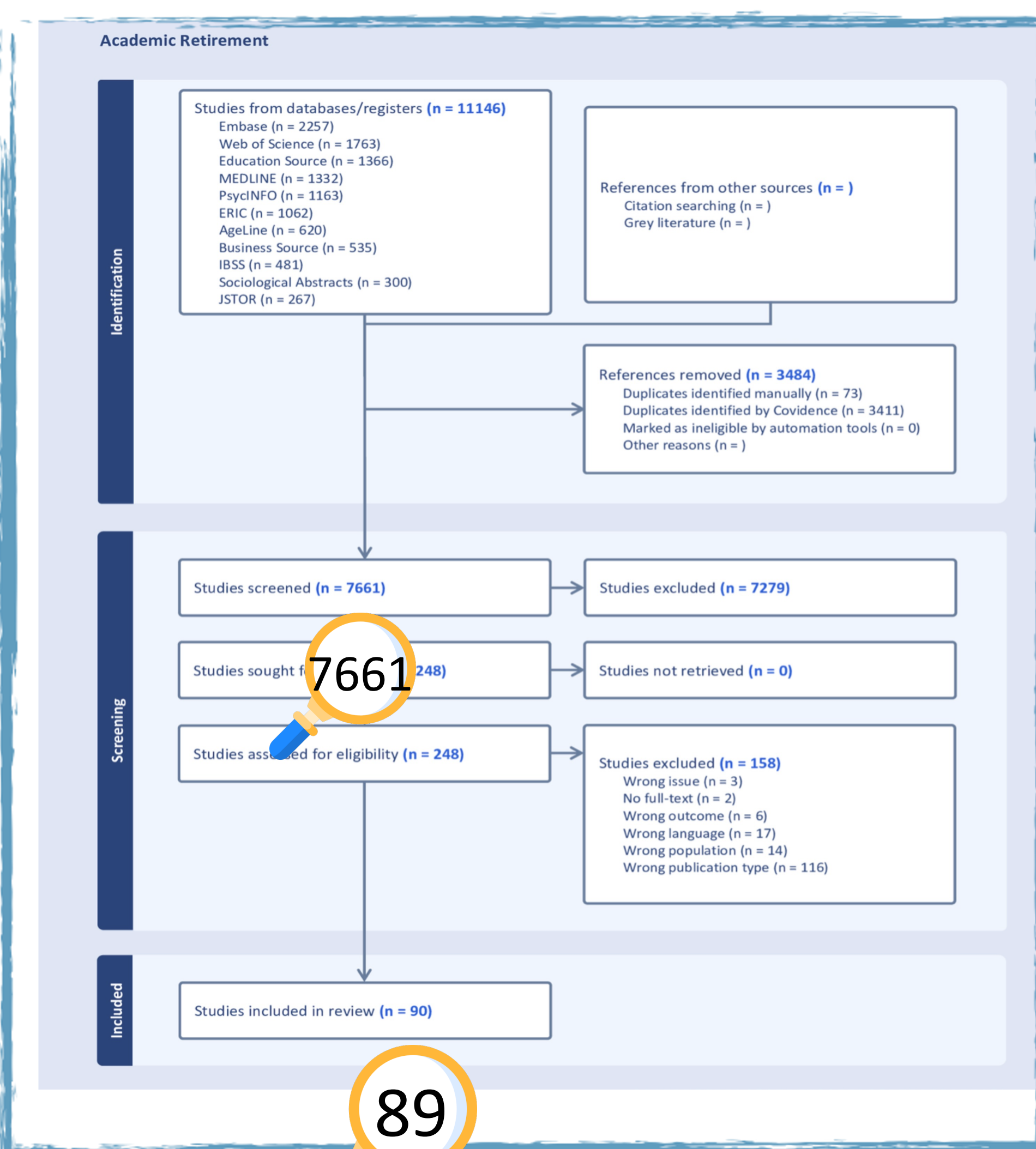


Figure 1: Summary of identification and screening of studies.

## 1 Study Criteria (Inclusion/Exclusion)

**Population:** academics

**Concept:** studies must focus on various aspects of retirement (ie. planning, concerns, activities), including phased retirement or early retirement.

**Exclusion:** studies that included non-academics or were not empirical studies.

**Context:** higher education, individuals must have worked as a faculty member in a university or college, or as an academic in a medical center or hospital affiliated with a post-secondary institution.

**Publication type:** Empirical research studies published in peer reviewed journal articles.

**Study design:** Qualitative, Quantitative, or Mixed methods

**Language:** English

**Date:** no publication date restrictions

**Search Strategy:**

Ovid MEDLINE: Epub Ahead of Print, In-Process & Other Non-Indexed Citations, Ovid MEDLINE® Daily and Ovid MEDLINE® <1946-Present>

## 2

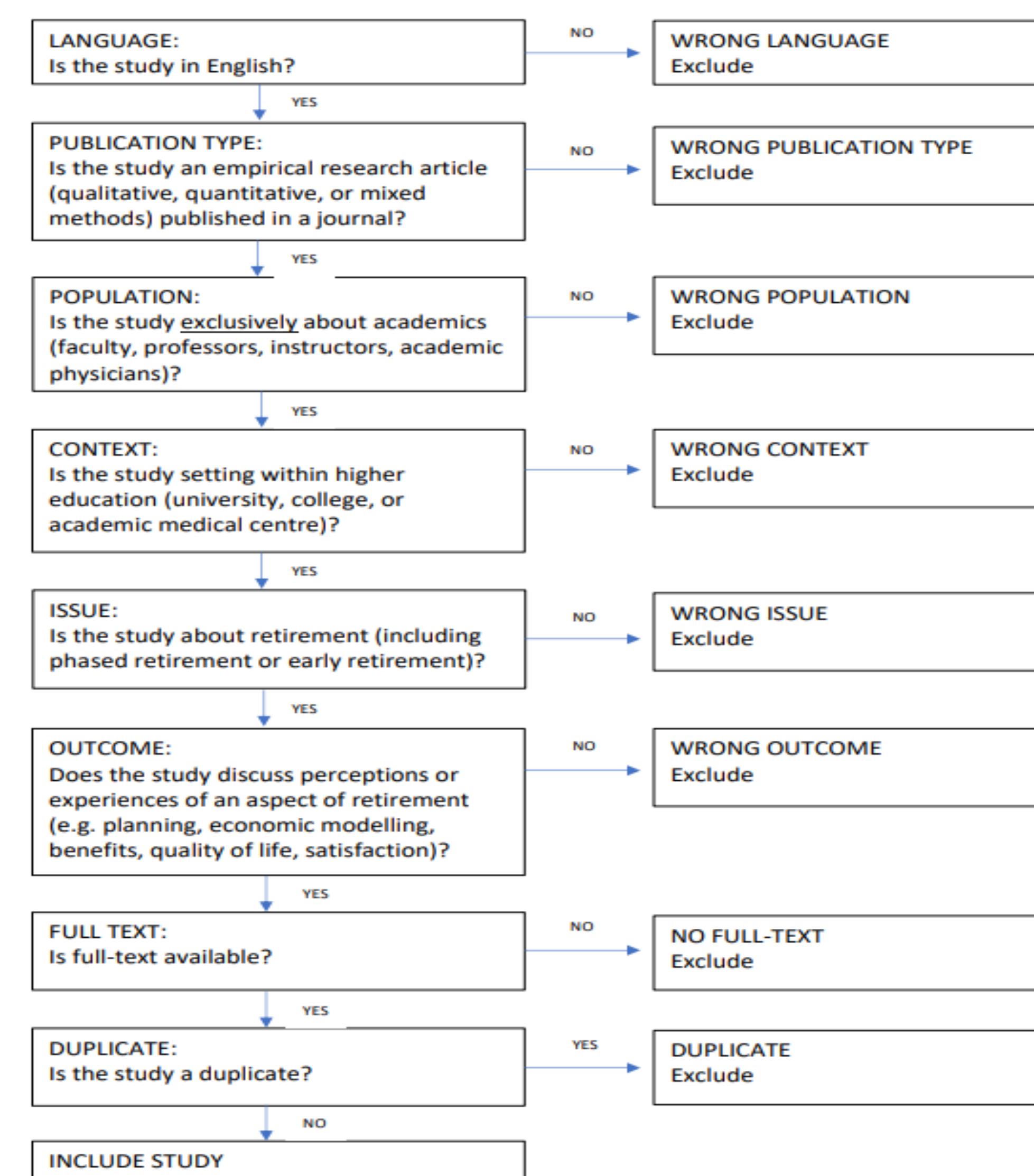


Figure 2: Flowchart used for the inclusion and exclusion of studies during the full text screening stage.

## 3 Data Collection Process

Data was extracted independently from selected studies using a form Excel.

### Data Items

The team developed initial charting variables based on the research question to extract data and identified key themes in selected articles.

Author(s)	Year of Publication	Article Title	Journal Title	Study Aim/Objective	Study Design/Methods
Clinton I. Chase, Susan J. Eklund, Linda M. Pearson	2003	Active Responses of Faculty Emeriti to Retirement	Educational Gerontology	To study the emotional (affective) reactions of faculty members to retirement	Mixed methods; Questionnaire, then a selected number of participants were interviewed. Questionnaire data was intercorrelated to determine common variance among items. Thematic analysis was done for interviews
Study Participants (Population/Sample)	Study Country	Study Setting	Stage of Retirement	Study Outcomes Related to Retirement	
All retirees from 1995-1999 at Indiana university, 153 completed the form. For interviews, a random sample from the original 153 was selected. Some declined an interview (or they could not be reached), 33 retirees were interviewed (prepared interview protocol) within 15 days.	USA	University, Indiana University	post-retirement, emeritus status experiences	<p><b>Questionnaire:</b> Persons who reported difficulty with detachment also reported difficulty with such variables as missing the community of scholars, daily interaction with colleagues, and cognitive challenges, and difficulty with the transition to retirement, leadership, missing research, and meaningfulness of activities.</p> <p><b>Interview:</b> Most retirees had looked forward to retirement, found a relaxed schedule and increase in control of time the best thing about retirement, the worst side was aging and declining health and feeling of detachment, most said they missed nothing about ending their professional associations, but more than a few missed academic colleagues and students.</p>	

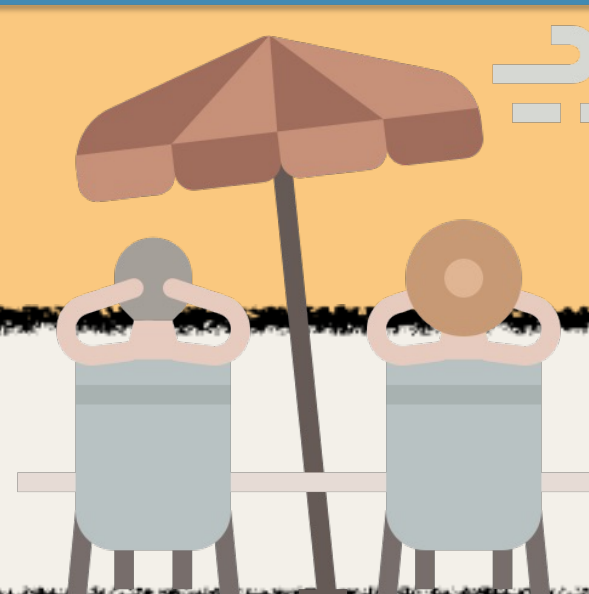
Figure 3: Sample of the data extraction template from our pilot test.

## Results

Studies of academic retirement tend to focus on financial planning and retirement timing.

While some evidence suggests that retired academics prefer to maintain stronger connections to the University or College that employed them in retirement it is less clear how to do so.

Most retirees look forward to retirement, but some miss their colleagues and students. They typically continue teaching and research in retirement, while also travelling and more.



## Future Research

Findings from this study may be used to inform University policies or guidelines on retirement timelines and transitions.

Future studies ought to investigate a range of later career options and transitions for academics and people in related professions

## References

1. Chronister, J.D. & Reed, C.M. (1994). Assessing the Effectiveness of Voluntary Retirement Incentive Options for Faculty : A Case Study. *CUPE Journal*, 45, 29-33.
2. Whitbourne, S. K., Smith, G., & Sperbeck, D. J. (1981). Is There a Generation Gap in Academia? Age Differences Among Faculty in Attitudes Toward Mandatory Retirement. *Educational Gerontology*, 7(1), 67-78. <https://doi.org/10.1080/0360127810070108>
3. Silver, M., Barrett, K., Teshome, B., Hou, C. (Melissa), Lalchand, P., & Santhikumar, S. (2023). *Protocol for Scoping Review of Academic Retirement*. <https://ispace.library.utoronto.ca/handle/1807/131039>

