

# Faculty Retirement

BEST PRACTICES

*for* NAVIGATING

*the* TRANSITION

EDITED BY Claire A. Van Ummersen,  
Jean M. McLaughlin, AND Lauren J. Duranleau



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## WORKING WITHIN YOUR INSTITUTIONAL MISSION

Mary Kochleff, *Xavier University*

According to Hindu tradition, life is divided into stages (Smith, 1991). Whereas the first half of life is composed of student and then householder stages, the second half of life consists of retirement and renunciation stages. According to Huston Smith, noted scholar of world religions, Hindus describe the retirement stage as traditionally beginning with the arrival of the first grandchild. It is also considered the time when an individual can withdraw from the responsibilities that characterize the householder stage, such as family, vocation, and civic social obligations, and instead focus internally. Smith describes the importance of this phase: "For many years society has exacted its dues; now relief is in order lest life end before we understand it" (p. 40). Spiritual adventurers in this phase were known as "forest dwellers" as they pursued self-discovery in solitude, which required taking leave of their families and homes. This time, explains Smith, is "for working out a philosophy, and then working that philosophy into a way of life" (p. 40). Those in the final stage of life, renunciation, become further detached, even from geographical connection, and released so from limitations that they are virtually anonymous.

When Father Leo Klein, SJ, a Jesuit priest at Xavier University, encountered this description as a faculty member teaching a course on world religions, the conceptualization of human life as stages, particularly the intentionality around later life, struck him as significant. In 2007, having served



as vice president for mission and ministry at Xavier and then retired himself, Klein wanted to lead others in conversation about purposeful self-discovery during, or heading into, the retirement stage. Called Second Fifty: Spirituality in Later Life Issues, Klein's program was designed by himself and several Xavier alumni initially for alumni only, and then it was expanded to include retired or retiring Xavier faculty and staff. Klein thought Second Fifty met a need he had often heard expressed by older friends and colleagues, namely, the need to make sense of one's life by reflecting on the past and seeking meaning for retirement. It required, as Hinduism had expressed, freeing oneself from the family and work obligations of earlier years and intentionally approaching later life as having its own new purpose.

For Xavier to offer a program such as Second Fifty is highly appropriate given its mission as a faith-based institution in the Jesuit and Catholic traditions. The Jesuit value of *cura personalis*, care for the whole person, calls the university to be concerned with multiple dimensions (including the intellectual, moral, and spiritual dimensions) of the lives of its students, employees, and alumni. Xavier's Center for Mission and Identity is charged with orienting faculty and staff to this mission and providing ongoing programs of education and support. This charge is increasingly important as the number of clerical Jesuit faculty decline and lay faculty and staff must play a more significant role in maintaining the university's Jesuit mission and values. The center offers as its cornerstone program Assuring the Future Mission and Identity of Xavier (AFMIX), which engages faculty and staff in a 2-year educational process on the Ignatian vision and its role in the classroom and other learning environments. The program includes readings, lectures, and reflection enhanced by weekly group discussions. Almost 200 faculty and staff have participated since 1999 in one of the seven AFMIX cohorts. The center more recently has developed a comprehensive mission orientation for members of Xavier's Board of Trustees and new senior administrative leadership.

The Ruth A. and Robert J. Conway Institute for Jesuit Education, which is part of the Center for Mission and Identity, focuses more specifically on supporting faculty in their engagement with Xavier's mission. Unique among the 28 Jesuit colleges and universities in the United States, Xavier's Conway Institute promotes and enhances the infusion of contemporary Ignatian-driven teaching methods in the classroom. A faculty member serves as the Conway Institute's director of faculty programs, receiving release from half of his or her teaching responsibilities to provide creative leadership for mission-related activities involving faculty. The faculty member holding this position rotates every 1 to 3 years. In addition, the Conway Institute annually supports a faculty fellow to undertake a pedagogical project that makes



a significant mission-related impact on the curriculum, learning environment, and students' academic experience at Xavier and beyond. The Conway faculty fellow receives a summer stipend, project budget, and release from teaching responsibilities to complete the proposed project. Conway faculty fellows have engaged in a wide range of projects that have addressed issues such as sexual justice on a Jesuit campus, international service-learning in computer science, and accessibility in online courses.

Several of the Conway Institute's programs have been targeted toward particular phases of faculty life, with the acknowledgment that different needs and opportunities present themselves as faculty move through their careers. The Ignatian Mentoring Program, for example, pairs faculty—typically junior faculty—with tenured faculty in their same college to discuss the Jesuit mission and identity in relation to their own disciplines and careers. The Time to Think Program was offered in 2009–2010 to support and encourage midcareer faculty reflection on the three primary spheres of professorial activity (teaching, scholarship, and service) within an Ignatian academic context. The Xavier Mission Academy, started in 2011–2012, similarly focuses on mid- and late-career faculty, providing them with a working knowledge of Xavier's mission and the tools needed to further integrate that mission into their classes in personally and professionally appropriate ways.

Although Xavier has been offering mission-oriented programming to all faculty and staff for many years, an intentional focus on late-career faculty has been created more recently, informed by faculty development models already in place at Xavier. These new offerings include a mission-focused program through the Conway Institute specifically addressing late-career faculty issues called Taking Time to Reflect, as well as a faculty learning community (FLC) on faculty legacy projects, operated through Xavier's Center for Teaching Excellence (CTE). For the Taking Time to Reflect Program, guiding questions, readings, and images are presented in modules online, narrated by senior faculty. These readings guide small-group conversations among late-career faculty who participate in the program's monthly meetings. The FLC targeted to senior faculty, started in fall 2012, is engaged in a yearlong conversation about the issue of legacy. Led by two faculty facilitators, the FLC has nine additional members. All three of Xavier's colleges—Arts and Sciences; Social Sciences, Health, and Education; and the Williams College of Business—are represented. Xavier's CTE, which opened in fall 2010, has to date hosted 16 FLCs, which in total have engaged more than 130 faculty (out of a full-time faculty numbering approximately 350). Adopted from a successful model started at Miami University of Ohio in 1979, Xavier's FLCs have addressed faculty desires for community building tied to deeper exploration of teaching-related issues.



## Second Fifty: Spirituality in Later Life Issues

The new programs targeted to late-career faculty are being designed to include consideration of Xavier's Jesuit Catholic mission, including the spiritual dimension of the retirement phase as addressed in Second Fifty. In its original configuration, Second Fifty met nine evenings, approximately once every 3 weeks, from October through April. Each 2-hour meeting started with a brief discussion with the whole group followed by smaller group conversation facilitated by committee members and included appetizers and beverages. Participants also receive materials, including books and DVDs. Participants pay a fee of \$110–\$150 to cover the costs of mailings, food, and materials. The sessions progressed through a range of topics using readings and films, read and viewed before the sessions, as starting points for reflection and discussion. The program concluded with a final session devoted to wrap-up conversation (See Table 13.1.).

A key text for the program is *The Gift of Years: Growing Older Gracefully* by Sister Joan Chittister, OSB (2008). In this book Chittister hopes to address what is lacking in gerontology, namely, "awareness of the spiritual dimensions of the only part of life that gives us the resources we need to make a long-term evaluation of the nature and meaning of life itself" (p. x). Echoing Hinduism, Chittister claims,

But perhaps the most important dimension of aging well lies in the awareness that there is a purpose to aging. There is a reason for old age, whatever our state of life, whatever our social resources. There is intention built into every stage of life, no less this one than any other. (p. xi)

Her chapters on topics such as legacy, transformation, and adjustment usefully guide reflection for sessions of Second Fifty. These and other readings are supplemented by films, including *Tuesdays With Morrie* (Forte, Winfrey, & Jackson, 1999), which documents newspaper columnist Mitch Albom's conversations with his 78-year-old sociology professor who is dying from Lou Gehrig's disease, and *Away From Her* (Iron, Urdl, Weiss, & Polley, 2006), about a couple married 50 years who struggle after the wife develops Alzheimer's disease. These films serve to raise issues regarding health, legacy, and loss, which are more fully explored during discussion.

Second Fifty participants engage in activities such as creating a heritage or ethical will. With its origins in the Hebrew Bible, the ethical will (*Zeva'oth* in Hebrew) is a document for passing along values to subsequent generations. As Jacob on his deathbed offered his blessing to his sons and named his desired burial place (Genesis 49:1–33), so too more recent iterations of the ethical will focus on providing direction and communicating a legacy. This



TABLE 13.1  
Second Fifty Schedule

setting	Topic	Readings/films
1	Introduction and Orientation: Transformation	<p>Chittister, J. (2008). "Transformation." In <i>The gift of years</i> (pp. 39–43). New York: BlueBridge.</p> <p>Smith, H. (1991). "The stages of life." In <i>The world's religions</i> (pp. 40–41). New York: HarperCollins.</p>
2	Review of Your Life: Memories/Reconciliation/Wholeness	<p>Chittister, J. (2008). "Regret." In <i>The gift of years</i> (pp. 1–5). New York: BlueBridge.</p> <p>Gunzelman, L. (2008, December 31). We measure time but what's it about? <i>Western Hills Press</i>, B2.</p> <p>Hassel, D. (1977). "Prayer of personal reminiscence: Sharing one's memories with Christ." <i>Review for Religious</i>, 36, 213–226.</p> <p>Maclay, E. (1990). "Occupational therapy." In <i>Green winter: Celebration of later life</i>. New York: Henry Holt. (Original work published 1977)</p> <p>Tolstoy, L. (2004). <i>The death of Ivan Ilyich</i>. New York: Bantam Classics.</p>
3	Your Image of God	<p>Arias, J. (1973). <i>The god I don't believe in</i> (pp. 1–4). St. Meinrad, IN: Abbey Press.</p> <p>Chittister, J. (2009, August 29). "The god who beckons." <i>National Catholic Reporter</i>. Retrieved from <a href="http://ncronline.org/news/spirituality/god-who-beckons">http://ncronline.org/news/spirituality/god-who-beckons</a></p> <p>Fischer, K., &amp; Hart, T. (1986). Images of God. In <i>Christian foundations: An introduction to faith in our time</i> (pp. 34–49). New York: Paulist.</p> <p>Himes, M. (1995). "Living conversation." <i>Conversations on Jesuit Higher Education</i>, 8, 21–27.</p> <p>Weintraub, J. (Producer), &amp; Reiner, C. (Director). (1997, October 7). <i>Oh, God!</i> [Motion picture]. United States: Warner Brothers Pictures.</p>

(Continues)

TABLE 13.1  
Second Fifty Schedule (Continued)

Meeting	Topic	Readings/films
4	Growing Older, Loss, Limitation, and Possibilities	Choice of book or film: Genova, L. (2007). <i>Still Alice</i> . New York: Gallery Books. Fortc, K., & Winfrey, O. (Producers), & Jackson, M. (Director). (1999, December 5). <i>Tuesdays with Morrie</i> [Motion picture]. United States: Carlton America & HARPO Productions. Iron, D., Urdl, S., & Weiss, J. (Producers), & Polley, S. (Director). (2006). <i>Away from her</i> [Motion picture]. Canada: Capri Releasing & Lionsgate Films. Also: Chittister, J. (2008). "Adjustment," "Fulfillment," and "Limitations." <i>The gift of years</i> . New York: BlueBridge.
5	Your Spirituality, Your Wisdom	Chittister, J. (2008). "Spirituality." <i>The gift of years</i> (pp. 179–183). New York: BlueBridge. Frankl, V. (2006). <i>Man's search for meaning</i> . Boston: Beacon Press. (Original work published 1946) Rohlheiser, R. (1998). "What is spirituality?" <i>The holy longing</i> (pp. 3–19). New York: Doubleday. Sirach, chapter 1. 1 Corinthians, 1:17–25.
6	The Role of Prayer	Chafets, Z. (2009, September 20). "Is there a right way to pray?" <i>New York Times Magazine</i> , 42–47.
7	Your Legacy	Chittister, J. (2008). "Legacy." <i>The gift of years</i> (pp. 215–218). New York: BlueBridge.
8	Dying as Part of Living	Bernardin, J. C. (1998). <i>The gift of peace</i> . New York: Doubleday.



document is often contrasted with or seen as supplementing the distribution of material possessions specified in a traditional last will and testament. It provides the opportunity to articulate, as Chittister (2008) calls it, our “immaterial legacy” (p. 216). Says Chittister, “Our legacy is far more than our fiscal worth. Our legacy does not end the day we die. We have added to it every moment of our lives” (p. 217). And as “the crowning moment of the aging process,” legacy is also the “major task” of later years; it is a work that remains in progress and that can be intentionally shaped so as to leave behind the meaning that we intend and that can guide others. “In this period of life,” Chittister concludes, “we have both the vision and the wisdom to see that the legacy is what we want it to be” (p. 217).

In Second Fifty the heritage-will activity is conducted during the session on legacy. Discussion during this meeting is prompted by the following questions:

- What “real issues” are especially important to you at this time in your life? Has there been a change in what you consider “real issues” as you’ve grown older?
- What specific ways, besides a written document, could you use to help your loved ones know of the legacy you want to leave them?
- What attitude toward life do you want to leave behind?
- Is there someone with whom you should make amends so that you don’t leave a legacy of hurt?
- Is there a specific work or project or goal you want to accomplish before you die?

The heritage will can be thought of as a love letter addressed to a specific individual or group, such as the entire family, “loved ones,” or friends. Adapted from the article “Estate Planning: How to Draft an Ethical Will” by Vanessa Cross (2009), the following prompts are used for drafting the document:

- The world I grew up in was . . .
- I am grateful to you for . . .
- Here are some important lessons I’ve learned in my life . . .
- My definition of happiness (or success or satisfaction) is . . .
- The books that are dearest to my heart are . . .
- There are many things I changed my mind about as life went on. Here are some of them . . .

Participants in Second Fifty have valued the program and its empha-



Responding to a survey at the end of the year, participants cite the variety of materials and the small-group discussion as important aspects of the program. They find it beneficial to stay in the same small groups through the program so that trust can be built among members. Some participants describe Second Fifty as filling a gap in addressing the spiritual aspect of later years. One wrote on the survey, "It's very valuable to be able to discuss such important issues with fellow travelers and to hear their stories and feedback. There is so much out there about aging, retirement planning, etc. but most lack a spiritual perspective." Others value stepping outside their daily responsibilities to reflect intentionally on their retirement, as Hinduism promotes. One participant said the program "helped me realize I have much to gain and to give in the later years of life. It helped me in making the decision to retire and to embrace a less 'scheduled' daily life."

Although the program has had as many as 46 participants in the nine-evening format, attendance has varied, and alumni have shown more interest than retired faculty. For spring 2013 Second Fifty was offered in a three-Saturday format to see if this schedule is more convenient. Retiring faculty, who have been invited to participate in the last two sessions, seem less interested in addressing their later years immediately when their careers shift to retirement. Their hesitance may confirm what one Second Fifty participant considered a drawback to the program, what she called an emphasis on the last quarter rather than second half of life. Faculty may be less willing, at least immediately, to let go of a career identity that can be so interwoven with their personal lives and less eager to examine retirement as a new and distinct phase.

### **Taking Time to Reflect**

To assist faculty before they retire, and while they are possibly contemplating that transition, Xavier has enhanced existing faculty development efforts with opportunities directly addressing the late-career perspective. The Taking Time to Reflect Program, developed by Debra Mooney Corcoran, PhD, assistant to the president and chief mission officer at Xavier, was offered by the Conway Institute for Jesuit Education for the first time in fall 2013. The program includes seven Web-based sessions with videos, readings, activities, and reflection questions, coupled with monthly group meetings facilitated by the Conway Institute director of faculty programs. The sessions ask faculty to revisit topics, such as Jesuit history and values, addressed in other mission-related programming. These topics are considered, primarily through the activities, reflection questions, and group meetings, from the late-career faculty perspective. For example, in the session on Ignatian



spirituality, the activity invites participants to engage in a daily reflection such as St. Ignatius Loyola's *Examen*, a series of introspective prompts focused on expressing gratitude, petitioning for knowledge of God and self, reviewing the day, responding to the review, and looking forward. This is expanded to an Ignatian Annual Examen, a reflective review of the past year guided by similar prompts. The session on Xavier's history includes reflection questions similar to the heritage-will exercise in Second Fifty. Inviting participants to consider their individual connections to the development of the institution, the questions include the following: (a) In what ways have I influenced the history of Xavier? and (b) How do I want to be remembered by my fellow colleagues?

The Taking Time to Reflect Program fits well within an existing scope of mission-related programming that faculty will likely have participated in earlier in their careers at Xavier. By connecting faculty's individual paths to the institutional mission and history, the program will engage faculty in reflection on their personal journeys in ways that are both familiar and non-threatening. Although the program is not overtly focused on retirement or spirituality, it may help faculty examine their life's work at Xavier in meaningful ways that will help them transition to the retirement phase when they are ready.

### **Faculty Learning Community and Fellowship on Legacy Projects**

Xavier's CTE started an FLC on faculty legacy projects in fall 2012 as a means of enhancing existing faculty development efforts with a new opportunity targeted to late-career faculty. FLCs have been popular at Xavier for connecting faculty across departments and colleges and providing opportunities to engage in conversations related to teaching. An important aspect of FLCs is their focus on the individual projects of participants. Although community building is critical to the model, FLCs are encouraged to move beyond discussion to some type of implementation, ideally experimentation by faculty in their classes. However, unlike committees or task forces, which are familiar models for faculty, FLCs do not operate under a charge; they are not tasked with fixing a problem or putting forward a recommendation. Their direction and use of time and budget are determined by the members themselves, led by one or two facilitators. For its yearlong exploration, the group is given a \$10,000 budget that can be spent on up to \$500 in professional development funds per member, as well as expenses related to meetings (including food), retreats, dissemination, and projects.

The Faculty Legacy Project FLC has not been entirely typical of FLCs supported by Xavier over the last 3 years. Because of the grant funding



supporting it, through the Alfred P. Sloan Award for Best Practices in Faculty Retirement Transitions, the topic was initiated by the CTE and then facilitators were recruited to lead the community. The FLC also began in late fall 2012, instead of August, so it did not quite run the full academic year as other FLCs have. The call for applications was successful, even though it went out midsemester, and attracted interested participants from all three of Xavier's colleges.

Given the creative space to consider legacy projects, the members have generated a range of ideas they are now pursuing. Several participants are interested in capturing the history of faculty and academic projects at Xavier in repositories that will continue to build over time. For example, a sociologist is developing a faculty oral history project to capture the stories of faculty nearing retirement or recently retired. An education faculty member is videotaping and interviewing one of the founders of Xavier's Montessori education program, an internationally known program that was one of the first university-based programs in the United States to prepare Montessori teachers. This project will help document Xavier's Montessori history and also provide a resource for Montessori education courses. In addition to these individual projects, the group has wanted to provide input to the administration about policies related to faculty retirement and strategies for continued involvement of retired faculty in university life. To that end, several members have collaborated on a survey for senior faculty whose results will be shared broadly on campus during the 2013–2014 academic year.

The CTE is designating another FLC for 2013–2014 for a topic related to late-career faculty. Faculty interested in facilitating this FLC have been asked to propose specific topics, from which one will be selected. All faculty will then be invited to apply to participate as one of the 8–12 members of the community. In the future, senior faculty can continue to propose FLC topics related to the late-career stage in the annual open call for applications. FLCs, which are designed to be a comfortable place for faculty-led conversations, will be an appropriate means of fostering ongoing dialogue about late-career issues.

In addition to supporting a second FLC on a topic particular to late-career faculty, the CTE has offered a fellowship for 2013–2014 on the topic of legacy. This will provide an extended opportunity for a faculty member to implement a legacy project. Each year the CTE has supported three faculty fellowships, one funded through the Conway Institute for Jesuit Education, on timely topics related to teaching. While one fellowship annually focuses on Jesuit education, the other two fellowships have addressed current issues, such as sustainability, international education, community engagement, and high-impact learning practices. The faculty fellow on implementing a faculty



legacy project will also participate with two other fellows in 2013–2014 to conduct significant projects with impact on the university and, potentially, other institutions of higher education. Each faculty fellow receives a summer stipend, project budget, and one-semester release from all teaching responsibilities.

The faculty legacy fellow may be chosen from the membership of the Faculty Legacy Projects FLC—one who would like to implement a larger-scale version of his or her individual FLC project—or may be another faculty member who has not participated in this FLC. In the call for fellowship proposals, the following examples were given to suggest possible fellowship topics:

- preserving the history of faculty or faculty work such as academic programs or lectures
- providing for the transitioning or sustaining of an existing program after faculty retirement
- designing and implementing opportunities for retired faculty to remain engaged at Xavier

The CTE expects that the Faculty Legacy Fellowship will result in a project of importance and also demonstrate how support for legacy projects can affect faculty individually and collectively. Future faculty fellowships may have a similar focus, as one ongoing faculty fellowship topic that has emerged is expanding an FLC topic. Faculty who have participated in FLCs related to faculty legacy or other late-career issues will be eligible to propose a fellowship project under this broad category.

## Conclusion

Xavier's culture of *cura personalis* makes possible a consistent and ongoing engagement of faculty in the university's Jesuit Catholic mission. Xavier's efforts to support faculty through the stages of their careers, including their transition to retirement, draw on this charism. Second Fifty's emphasis on the spiritual dimension of later life, while overlooked in most retirement-related programming and foreign within university culture at many institutions, has context and history at Xavier and, indeed, is helping inspire and enrich faculty development efforts related to late-career stages. As Hindu tradition asserts, the later stages of life deserve dedicated time and space and warrant rich reflection. Programs focused on the transition to retirement can help faculty contemplate the meaning of their careers, which are often a life's work, comprising many years in a single profession (and sometimes a single institution) and interwoven deeply with their personal lives.



In implementing enhanced programming specific to late-career faculty, Xavier has intentionally built on existing faculty development structures, including those related to mission and teaching. Xavier's active Center for Mission and Identity now includes Taking Time to Reflect among its multiple programs addressing the spectrum of the faculty career from pre-tenure through pre-retirement. The CTE similarly is including late-career topics, such as faculty legacy, among its FLC and faculty fellowship focus areas. Adding programs specific to late-career issues within familiar faculty development structures will increase participation and interest in these efforts and help ensure their long-term sustainability. Ideally, conversation about late-career issues and retirement will become as commonplace among faculty development topics as efforts to support new and midcareer faculty. Like most higher education institutions, Xavier has a significant number of faculty in the late stage of their career or approaching retirement. Many have been shaping the university culture and the lives of Xavier students for decades. Support for these faculty recognizes the importance of their past and ongoing role in the institution.

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