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The transition to retirement from academia

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Significance:

Retirees represent a growing segment of the population as life expectancy increases and the length of retirement is extended. This growth has prompted a number of studies into the nature of retirement. Associated with this interest is an exploration of the meaning of work and impacts on meaning formation in the transition to retirement. Increasingly, retirees are exploring concepts such as the 'third age' and 'successful ageing' as they enter their retirement years in a good state of mental and physical capacity. This exploration is particularly prevalent in those retiring from academic posts, for whom identity is often closely bound with their productive work, whether in research or teaching. Whatever the mode of stepping down from full-time paid employment, the literature is unanimous in its observation that planning for retirement is the strongest indicator of a successful and meaningful transition.

Since the late 1980s, the Meaning of Work has been the subject of many studies, following the pioneering study done by the MOW International Research Team's publication of *The Meaning of Work*[1], which represented 14 000 respondents in eight countries[2]. This seminal work explored five dimensions: "...work centrality as a life role, societal norms regarding work, valued work outcomes, importance of work goals, and work-role identification"[3]. While the concept of work has changed over the past decades as work has become more flexible for many, it is still regarded as "*inherently* a meaningful activity" (emphasis in the original).[4] Work can be defined by the extent to which it fulfills "...four different important functions: economic (to earn a living), social (to interact with others), prestige (social position), and psychological (identity and recognition)"[3]. This centrality of work in our society then raises the question: How does one construct meaning in life when work ceases, especially at retirement?

As life expectancy increases and retirement age becomes more flexible, people can expect to live a substantial proportion of their life in retirement of one form or another. Some people are opting to retire early, whether to engage in leisure activities, family care or productive pursuits, while others may be encouraged to take early retirement through retrenchment or workplace restructuring. In a society that places much emphasis on productive work, meaning in retirement becomes a challenging concept. This challenge is heightened in academia, where one's identity is often bound up with one's productive output, especially in the form of research or professional contribution.

Given its prevalence in formal economies, the phenomenon of retirement is relatively recent, dating to Bismark's introduction of old-age social insurance in 1889.[5] Retirement itself has undergone transformation in recent decades, as retirees seek out alternatives to the normative concept in which the retiree ceases paid employment and spends the rest of their life engaging in unpaid activities (e.g. leisure, volunteering), gradually downscaling to the end of life. An exploration of the literature highlights that there is increasing diversity in modes of retirement, as well as in people's relationship to paid work, with many of retirement age opting to downscale with their pre-retirement employer, or seek alternative paid work, whether to pursue other interests or for financial reasons. Increasingly, the transition to retirement is no longer linear from one state to another, but rather "a bricolage of interwoven life processes"[6].

Ours is a society that places considerable emphasis on work, attributing to it authenticity, self-efficacy, self-esteem, purpose, belongingness, transcendence and sense-making.[7] It is not surprising then that people facing retirement may experience existential dread with the expectation that their life will lose meaning, and that they will lose status in their new situation. To counter this, we observe in the 'baby boomer' generation, a number of concepts and strategies around retirement that resist these negative associations with retirement, concepts such as the 'third age' and 'successful ageing'. The latter concept is founded on the observation that many reaching retirement age are still in a good state of health, are fully mentally and physically functional and are actively engaged.[8] The 'third age' concept has many similarities, with the emphasis on mental and physical health and fitness, characterised by continual learning and engagement in fulfilling activities.[9]

Fasbender et al.[10] recognise four categories of meaning that we attribute to work: social, personal, financial and generative. All four of them potentially feed into meaning in retirement, depending on individual circumstances. Of the four, the generative is the most interesting, in that Fasbender et al.[10] have determined that people in post-retirement paid employment will tend to be egotistical, whether hedonistic or for financial gain, whereas those who engage in civic work or family care will have more altruistic motivation. August[11] identifies four kinds of meaning in retirement: (1) as a new phase of life which opens up new possibilities and priorities; (2) a final phase of life; (3) a frightening period associated with financial, social, or personal loss; and (4) a mark of achievement in one's life presaging a period of relaxation as a reward. Mapped against Fasbender et al.'s[10] pragmatic meanings attributed to work, August[11] sees meaning more as emotional responses to the retired situation, each of which potentially embodies some or all of Fasbender et al.'s[10] categories. For example, if retirement is seen as a new phase of life, this could entail new social engagement, personal growth in new skills and knowledge, a new income stream and/or the creation of new outputs from the new knowledge and skills.

In academia, retirement is often a transitional process, in which the retiree scales back from administrative duties, but may still continue to teach and supervise postgraduate research. This is more prevalent among the professorial cohort, for whom lifelong emeritus positions are common. The focus of many of these semi-retired people is on

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research – an area of engagement that, for many, was relegated to the back seat in the last few years of their full-time employment, when they may have had a senior appointment with a large administrative burden, preventing them from engaging in their preferred activities such as research.[12] In an emeritus or honorary position, the individual often has the freedom to choose how they spend their time in academic pursuits, whether teaching, supervision, research or community outreach on behalf of the university. There is also a prevalence of retired academics seeking out a larger role within the institution, often crafted on their previous administrative duties or some new venture that they orchestrated towards the end of their career. This is often a conscious strategy to ensure identity and meaning post the retirement age, thereby postponing 'real' retirement. It should be noted that not all academics and few administrative staff in higher education have the luxury of choice in their post-employment relationship with their institution – for them, retirement is a clean break, requiring them to seek other avenues in which to craft meaning. Also of note is the changing environment of research, moving from a more discipline-based to a more collaborative scenario, across disciplines and/or inclusive of industry and other government entities.[13] Such collaboration with bodies and individuals outside academia, while potentially impacting on research autonomy and its integral link to intellectual identity, might, on the positive side, offer post-retirement opportunities for ongoing employment or less formal interaction.

So the question is then: How does one conceptualise and forge meaning in retirement, after a career in academia in which meaning is so strongly embedded? The meaning of work in an academic setting is both internal, in terms of personal growth, and external, through teaching and supervision in which skills and knowledge are transferred to others. This may be why so many in emeritus and honorary positions elect to continue teaching, and not just continue their research activities. Moreover, teaching helps to preserve the physical routines of the academic year, providing structure and purpose.

Whether one takes up an honorary post, or opts to make a clean break, the literature is unanimous in support of planning for retirement. Planning may take many forms, from the obvious and often imposed financial planning, through to one's daily routines and social contacts. There is an inevitable shift in one's relationship with colleagues when one has an honorary position: what was previously dominated by workplace engagement, now takes on a more social or mentorship complexion. There is a sense that one takes a more passive role, waiting for others to initiate communication as their time is less flexible.

There is debate about whether a retiree should aim to structure a new set of routines, or celebrate the newfound flexibility afforded by retirement. Self-motivated activities may seem quite forced and artificial, self-indulgent or 'consumptive', in contrast with the 'productive' orientation that may have characterised much of one's activities prior to retirement. This said, it is often the first real opportunity to be able to take up a new venture, such as learning a language or musical instrument, for the pleasure of doing it, rather than because it was demanded by one's employment.

In the first few weeks and months of retirement, there is a necessary period of adjustment, whether as simple as restructuring one's wake-up routine, or on a much larger timescale. Suddenly, the demands have to come from within, rather than from the imposed regimen of meetings and other scheduled activities.

Researchers into meaning in retirement have looked to continuity theory as a way of conceptualising decisions of retirees. As described by Cahill et al.[14]: "...continuity theory suggests that one will aim to maintain a coherent sense of self by retaining experiences, habits and lifestyle patterns acquired during their life". They note that female academics who continue activities related to their previous academic role transition to retirement more effectively, as a means of preserving "a coherent sense of self"[15].

This discussion is framed within a context of financial and intellectual privilege in a country (South Africa) with extreme contrasts of wealth and educational opportunity. Likewise, much of the literature on retirement is located within the upper-middle income group in highly developed countries. Much work needs to be done in researching people's creation of meaning in their post-retirement age from other income groups and from other sectors of the population, such as disadvantaged groups and the unemployed.[16]

Declarations

AI was not used in the preparation of this article.

Competing interests

I have no competing interests to declare.

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