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Retiring from 'University Life': Critical Reflections on a Retirement Lifestyle Planning Program

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Abstract

While assisting individual workers to prepare or plan for a successful transition to retirement is a key responsibility of human resource (HR) departments, within many large organizations (including universities) preparations related to financial planning are prioritized, with limited evidence of consideration for the lifestyle preparations needed. The purpose of this study was to evaluate a series of leisure education-based webinars focused on supporting university employees to engage in lifestyle planning associated with the transition to retirement. In addition to live sessions, a learning management system provided access to discussion boards and resource materials with senior students available to provide individualized assistance. Participants (n = 44 across two implementations) indicated wanting assistance to make retirement fulfilling or rewarding. Participants were very-to-highly satisfied with the sessions, with the most highly valued focused on self-exploration (e.g., considering values, beliefs and strengths to bring into retirement). Participants also valued opportunities to reflect on what aspects of their work life they want to bring with them into retirement, and what they want to leave behind. Although a 'readiness' for self-exploration seemed important, opportunities for *leisure*-related self-reflection and assessment seemed particularly beneficial. Findings are discussed in relation to considering HR departments' responsibilities to assist university workers to prepare for the retirement transition. Leisure education as a tool for facilitating retirement planning in the university context is warranted. Possibilities for incorporating peer-to-peer education and support—as well as tailored educational sessions—are discussed.

Keywords Leisure education · Lifestyle planning · Retirement · Transition · University

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1 Introduction

Retirement is a paradoxical life transition. On one hand, it can be an exciting time in which one looks forward to connecting with family, having more time to do valued activities free from obligations, and to leaving behind stresses of work (Freedman, 2013; Miron et al., 2021). However, it also a major life event that can create upheaval in social connections and people's sense of self (or identity) (Haslam et al., 2018). Similarly, work life in a university is also paradoxical. University staff and faculty are part of an institution that is often widely recognized and valued within their community. A distributed model of governance within many universities is foundational to fostering a sense of collegiality. Further, working in partnership with diverse unit-level, university- and community 'partners' further reinforces the social world (Unruh, 1979) that comprises university life. In fact, it is this social world that Stebbins (2019) and others (e.g., Dorfman, 2009; Rowson & Phillipson, 2020) argue is the most difficult feature to leave behind in retirement from a university position. Alongside this commitment to service, university life is also often associated with freedom and autonomy (e.g., for self-directed tasks like research that reflect personal passions) and social identity that transcends mundane work responsibilities. Thus, working within a university is viewed by sociologist and leisure scholar Robert Stebbins (2019) as "occupational heaven" that is contrasted with an "incongruous lifestyle… [and] lonely, unsettling existence" that follows retirement (p. 447). Although this may not be true for all university employees, retirement from university life is an adjustment with many factors that impact well-being in the transition, such as connections to community, social connections, and identity (Cook, 2015).

For organizations, employees delaying retirement can result in negative impacts. Diminishing motivation and increasing 'disengagement' can occur amongst older workers (Rau & Adams, 2013), therefore employers have a large stake in facilitating retirement transition processes. Henkens and van Dalen (2013) suggested that "employers are key players in defining the opportunities for retirement" (p. 215) and often maintain an "implicit contract" (p. 216) with their employees regarding the relationship between productivity and earnings. They noted that this is "unsustainable if workers work beyond the age at which the net present value of wages exceeds that of the productivity profile" and further noted that additional factors, such as social security, health care, and pension premiums "make an aging population an even more serious liability" (p. 216). Academics who continue to work beyond their eligible years of retirement affect a university's ability to attract (and retain) highly productive and skilled younger workers (Henkens & van Dalen, 2013). Assisting individual workers to prepare or plan for a successful transition to retirement is a key responsibility of human resource departments (Rau & Adams, 2013).

Many large organizations, including universities, offer informational or educational sessions designed to facilitate planning for the retirement transition, such as offering workshops on government or university pension plans. We could find little evidence of universities caring for the future *lifestyles* of their workers. The purpose of this study was to evaluate a series of leisure education-based webinars focused on supporting university employees (academics and staff) to engage in lifestyle planning associated with the transitional challenges of retirement. Before presenting the study context we will briefly describe retirement, and review literature about organizations' interest in retirement, what is known about retiring from an academic position, and propositions regarding the role of leisure education in preparing for the retirement transition shifting focus to what is lost in retirement to what can be gained.

2 Literature Review

2.1 The Retirement Transition

Retirement is viewed as an "expected life course transition in contemporary, industrialized societies" (Wheaton & Crimmins, 2013, p. 22) largely defined and structured by national social security retirement benefits programs (e.g., Canada Pension Plan). At the individual level, retirement is also viewed as a "major life changing event" (Wang, 2013, p. 3), which can have direct impacts on one's subjective well-being. Retirement typically signifies a discrete 'ending' or termination from paid employment, although many people may elect to continue or return to work for the same or a different employer (e.g., bridge employment or contract work). Given mandatory retirement has been abolished in many jurisdictions, this could mean some workers choose to work long after what is considered transitional retirement age of 65. Across the Canadian workforce in general there was a 178% rise from 2012 to 2022 in the number of Canadians aged 65 years or older who are still employed (Statistics Canada, 2022). There are noted similarities for individuals working in a university setting (e.g., Dorfman, 2009).

While retirement is influenced in large part by (real or perceived) economic conditions (Wang & Shultz, 2010), many university employees have a relatively secure pension (although staff and faculty unions are typically separate); nonetheless many choose to continue to work long after age 65. According to a report from the Higher Education Quality Council of Ontario, the proportion of professors in Ontario over the age of 65 has grown almost nine percent, with 1,239 working professors older than 65 years old in 2016 (Chiose, 2018). At our own institution approximately 4% of employees (n = 182 staff and faculty) continued to work past the age of 65 in 2021, compared with 2.5% in 2017. With our focus on retirement from a university context, we explore reasons why university-affiliated workers seem reluctant to retire in the following section.

2.2 Retiring from University Life

Efforts were made to identify literature that addressed not only academics' transition to retirement but other university employees as well. There is a surprising lack of research in the peer-reviewed literature that addresses university staff (non-academic) roles. We were able to find only one study, out of Australia, that examined university employees' (including academic and non-academic staff) preferences regarding retirement and found most preferred to reduce the number of days worked per week or to continue working. There were significant gender differences however; women were more likely to desire a reduction in workdays per week whereas men were more likely to prefer to continue working as currently or to reduce responsibility. "Economic reasons are more likely to be the barrier for women, while organisational reasons are more likely to be the barrier for men" (Maloney, 2022, p. 93).

Most of the literature we found focused on academics' transition from university life, where one's professional identity as a recognized 'expert' appears to be make the transition to retirement more challenging. We briefly review them below but, taken together, these studies highlight the centrality of professional or social identity associated with the professoriate.

Stebbins (2019), a long-time expert in sociological approaches to leisure, lamented the loss of a valued social world associated with university life when one retires from an academic position. Stebbins argued that, associated with this loss of a social world, comes further losses in one's personal and social identity including the loss of "locally recognized organizational entity, source of livelihood, set of like-minded friends and colleagues" (p. 446) and other "prized features of everyday living" (p. 447). He particularly focused on the features of a university that contribute to creating a vibrant social world and suggested ways that serious leisure pursuits can substitute for this.

Ellis and colleagues (Ellis et al., 2017) shared that it was the change in the culture of the university, especially with the shift to computer technology (resulting in increasingly working alone in one's office), that led to the decision to retire. Most expressed delight at leaving behind never-ending forms of 'administrivia' but also sadness at leaving behind a connection to the university and not being sought out as an influential expert.

Cahill et al. (2019) conducted a systematic literature search to identify qualitative studies (n = 20 included) focusing on academics' experiences of retirement. The majority of studies noted how many academics continue to work in retirement, but leave behind aspects of their work they disliked (e.g., teaching and administration). The biggest challenge identified across the studies was the impact on the academics' identity. As they noted "For many academics, retirement is associated with feelings of fear regarding the potential loss of identity in retirement" (p. e187) including threats to self-worth, self-esteem, feelings of belonging to a professional 'community.' The other significant 'loss' identified with retirement was the result of changing relationships, again highlighting valuing of the social world of university life.

Dorfman (2009) noted that academics share many of the attributes of other highly educated professionals (e.g., engineers) who are employed in occupations characterized by job complexity, high levels of autonomy, and low physical demands. She conducted interviews with faculty (n = 13) at a research-intensive university who elected not to retire after the abolition of mandatory retirement (at 70). Those still working in their 80 s were doing so because they enjoyed it or felt it was important to continue the research they were doing. The reasons given for retiring were changes in students or the 'culture' of the unit, faculty or university. As one participant explained "The old collegial climate was changing. It wasn't unpleasant, it was just different. It just didn't provide the old excitement…" (in Dorfman, 2009, p. 1019). As it relates to retirement planning, Dorfman (2009) noted that: "Neither employed nor retired professors engaged in substantial planning for retirement; when such planning did occur, it tended to involve financial planning and checking on retirement benefits with the university" (p. 1043).

Similar themes were identified by Rowson and Phillipson (2020) who interviewed retiring male professors in Brazil and the United Kingdom. They also found that for many it was difficult to imagine a life outside the university, with their work described as "a passion, or part of a legacy contributing to a better world – whether through teaching or research" (p. 5). While changes in the university culture or senior leadership led many to feeling less connected, a lifetime of developing international networks and recognition also made it difficult to leave.

Loss of identity and a social world of universities was also noted in another study of Brazilian professors (n = 11, 8 females; Nascimento & Polia, 2019). The authors found that most they interviewed were struggling to imagine their lives outside of university and added: "Usually, these professors are those who have devoted most of their lives to the university and have developed few activities out of this environment" (p. 394). Within the Brazilian culture Nascimento and Polia noted that retirement is associated with marginalization and perceived uselessness, whereas being a university professor offers prestige. The authors suggested that universities invest in the creation of groups focused specifically on planning for retirement, including focusing specifically on the factors that prevent them from retiring, in order that the benefits of retiring can be perceived as more rewarding than what they are leaving behind.

In the next section we review literature on the role of leisure and leisure education in supporting successful retirement transitions.

2.3 Leisure and Leisure Education as Potential Solutions

As identified in the literature reviewed above, there is considerable evidence the transition to retirement (especially for academics), has a significant impact on people's sense of self or identity and perceptions of loss of belonging to a valued social world (e.g., Cahill et al., 2019; Ellis et al., 2017; Stebbins, 2019). Retirement in particular can pose one of the greatest threats to one's sense of self, as identity is often closely related to what we do (Unruh, 2004). Although this is likely not the entirety of university employees' experiences when they retire, we believed that leisure could be part of the 'solution' to adapting to changes experienced in this transition to retirement, as there is substantial evidence of the ways leisure serves as a context for meaning-making (Iwasaki et al., 2018), identity development and expression (e.g., Mai & Hao, 2020), and for experiencing a sense of belonging and purpose (e.g., Liechty et al., 2012) in adulthood. In fact, because of its very nature, leisure can be a 'liberating' context that, according to Deschenes (2011, as cited in Iwasaki et al., 2018), can free people from the push for productivity.

Across both anticipated and unanticipated life transitions (e.g., in health, relationships, residential relocation and retirement) leisure researchers have examined the impacts of these changes on people's leisure participation but also how people make sense of these changes and adapt or grow from them (e.g., Hutchinson & Kleiber, 2005; Kleiber et al., 2002; Liechty et al., 2012; Nimrod, 2007; Prentice et al., 2022). While transitions can be opportunities for personal growth and exploration, they also give rise to the need to maintain valued self-perceptions and social roles. In the face of changes in adulthood, Kleiber and Nimrod (2008) argued for attending to leisure innovation, which they argued "can be growth promoting and liberating … while at the same time generally protecting a sense of internal continuity" (p. 1), with the potential for fostering personal growth, interest renewal and identity reconstruction. In a study of retirement-aged women Liechty and colleagues (2012) found that leisure innovations contributed to increased feelings of joy, self-confidence, and independence along with improved social connections. Yet, there is other retirement literature that suggests that people, for the most part, continue patterns of activity from work into retirement (Rosenkoetter et al., 2001). Cook (2015) explored how volunteering played a role in supporting retirees in their transition in that they used their career skills and identity in a meaningful and purposeful way while also feeling connected to others and their community. Taken together, this suggests that there is "a need for early planning and programs on use of time activities and management designed to meet individualized needs in preparation for retirement and during postretirement adjustment" (Rosenkoetter et al., 2001, p. 1).

To this end, we believed there is value in helping people experiencing the transition to retirement to develop leisure-related knowledge, skills and awareness so they may feel more confident and prepared for the transition to retirement. Leisure education is the ideal tool to do this (Kleiber & Linde, 2014; Kleiber et al., 2012). Leisure education applies theory and evidence about leisure and leisure behaviour to the design of experientially or learning-oriented activities designed to enhance participants' knowledge, skills, awareness and confidence related to leisure/recreation participation (Dattilo, 2015). Although there have been several recent studies examining the role and value of leisure in retirement (e.g., Earl et al., 2015; Lee et al., 2020; Nimrod, 2007), from what we have found, Kleiber and colleagues (Kleiber & Linde, 2014; Kleiber et al., 2012) are the only leisure scholars to argue for leisure education focused on the retirement transition. Kleiber and Linde (2014) reviewed a wide range of retirement and leisure-related evidence to suggest that leisure education could address the following topics to support successful adjustment in retirement: (1) Examine what is lost in the transition to retirement (e.g., opportunities to express competence) and how leisure can serve as a context for meeting these enduring needs (i.e., to compensate for or replace what is most valued about work); (2) Focus on examining the various ways different forms of leisure can be a 'restorative resource' for health and wellbeing, including a focus on addressing social needs. As part of the latter Kleiber and Linde encouraged an examination of the purposeful roles people can assume in retirement, including volunteering.

For both of the above goal areas, Kleiber and Linde (2014) suggested that retirement planning programs focus on helping people: (a) deepen self-awareness and clarify values, (b) identify resources or opportunities (e.g., within one's neighbourhood or community), (c) have the chance to 'experience' leisure (e.g., leisure sampling), and (d) engage in problem solving that supports making decisions and commitments. These recommendations align with the needs and challenges identified in other research on leisure and adjustment in the transition to retirement, so were the basis for program development and evaluation. Further description of the leisure education areas of concentration (Dattilo, 2015) used to frame program development are described in the Program Development section that follows.

2.4 Summary of Purpose

As noted above, supporting employees to prepare for the retirement transition is a responsibility of human resources departments within organizations. Yet, to date, their primary response is in the form of pensions or other incentives, with education focusing mostly on financial planning. Therefore, although the retirement transition is a major *life* event for most individuals, there is limited support for planning for this life change (except for the financial aspects). From the literature reviewed on university professors' attitudes towards retirement it does appear many struggle with this transition, especially associating it with a loss of social role identity and the social world of university life. Although there are several recommendations to develop holistic and comprehensive educational opportunities that address retirement planning, including planning for what is lost and gained in retirement, we could not find another study that has evaluated a developed retirement lifestyle planning program. Below is an overview of the program, and results from evaluating content/processes and outcomes associated with two iterations of its implementation.

3 Methods

3.1 Program Context/Overview

It was through our university's HR department that we received a small grant, called the Workplace Wellness Grant, to develop, implement and evaluate the retirement lifestyle planning program that is the subject of this paper. Program development and implementation was completed by the authors and undergraduate students whose responsibilities were to be student coaches. Two members of the team (second author and one student coach) had/were experiencing the transition to retirement which added to the richness of the support provided as they had that extra connection with participants.

The aim of the program was to offer a series of interactive workshops focused on different aspects of planning for a fulfilling retirement life, along with access to individualized follow-up 'coaching.' Notably, we informed program participants that the program was not designed to address financial planning.

3.2 Program Development

Program development was informed by key journal articles discussing retirement and lifestyle planning (e.g., Froidevaux et al., 2016; Kleiber & Linde, 2014; Moffatt & Heaven, 2017; Osborne, 2012). Content areas were also developed according to leisure education strategies for retirement preparation programs (Kleiber et al., 2012) as well as existing leisure education models. Specifically, Dattilo's (2015) areas of concentration for leisure education informed the program development. Dattilo suggests that leisure education should be designed in a way to assist participants to: "explore various perspectives, develop an ethic conducive to leisure, and cultivate self-awareness" (p. 65). These recommendations were reflected not only in the overall emphasis of the program on self-reflection and self-assessment, but also in relation to specific topic areas such as 're-imaging the self' and identifying personal values, strengths, and interests (See Table 1). Dattilo also recommends focusing on building participants' knowledge and/or skills related to goal-setting, decision-making and social connections. Again, these were key foci of the session's topics. A final aspect of Dattilo's areas of concentration for leisure education focuses on helping participants to manage challenges; an entire session was devoted to this in the webinar series (Session 5: What might get in the way).

Therefore, the program was developed to include content across several different topics and concepts: goal setting; exploring changes in retirement (e.g., what is gained and lost); personal values, needs, strengths; anticipated experiences in retirement; the importance of leisure and making time for it; time use and the importance of finding purpose; planning both short- and long-term; barriers and unexpected challenges in retirement; mastery; the importance of staying connected; and resources. The program outline, including each session's title, objectives, content, and homework can be found in Table 1. This table is based on the second implementation of the program, and notes have been made to highlight any major changes from the first implementation.

3.3 Program Implementation

Program delivery and implementation was the same across both implementations. The program was originally designed to be delivered in-person in a 'lunch & learn' style series, but the COVID-19 pandemic led to an online delivery format. Webinars took place on the same day of the week and time of the day (e.g., Mondays, 12:00 pm-12:45 pm) with an optional discussion time (15 min) for anyone who wanted to talk with facilitators after the webinar content was delivered. Each webinar started with informal discussion as participants arrived, and formally started with a land acknowledgement, a quick introduction to the day's topic, and was then followed by a 'Poll of the Day' activity where participants were asked a fun question related to the topic (e.g., What is your comfort level with planning? Answers: 1) I'm a planning wizard, 2) I'm pretty good, 3) Average Joe/Joanne, 4) Not great but willing to learn, 5) What's planning?). Then, each webinar contained educational

Table 1 Program outline

Session # and name	Objectives (W1Ob1 = Webinar 1, Objective 1)	Content	Homework
Webinar 1: Retirement, Your Transition	1. Understand the importance of planning retirement (W1Ob1) 2. Identify personal goals for their transition into retirement (W1Ob2) 3. Understand the concept of transition and the role it plays in retirement (W1Ob3)	Introduction	Goal setting
Webinar 2: Gains, Losses, and Re-Imagining[1]	1. Assess work-related gains and losses that will be brought forward into retirement (W2Ob1) 2. Reflect on personal values and beliefs in order to consider who they want to be in retirement (W2Ob2) 3. Identify personal strengths which may help them with their transition into retirement (W2Ob3)	Exploring what changes in retirement (e.g., things lost and gained) and personal values, needs, and strengths	Identifying personal values, needs, and writing down how they envision their future retirement
Webinar 3: Leisure in Retirement	1. Understand the importance of engaging in meaningful leisure in retirement to support health and well-being (W3Ob1) 2. Identify leisure/recreation activities which align with personal values, belief, and strengths from Webinar 2 (W3Ob2)	The importance of leisure and planning leisure	Completing a leisure inventory and identifying personally meaningful leisure benefits

Table 1 (continued)

Session # and name	Objectives (W1Ob1 = Webinar 1, Objective 1)	Content	Homework
Webinar 4: What Really Matters	1. Reflect on different personally meaningful ways they can give back or leave something behind in retirement (W4Ob1) 2. Develop a short-term plan for daily life in retirement, including meaningful activities related to leisure/recreation, and giving back/leaving something behind (W4Ob2) 3. Develop a long-term plan for retirement including bucket list items, meaningful milestones, and goals (W4Ob3)	Time use, finding purpose, and planning	Practice in making a long-term plan in relation to goals from homework 1 while incorporating leisure from homework 3
Webinar 5: What Might Stop You	1. Identify potential barriers to meaningful engagement in – or planning for – retirement (W5Ob1) 2. Practice problem solving and discussing strategies for overcoming these barriers and unexpected challenges to engagement or planning (W5Ob2)	Barriers and unexpected challenges in retirement	Problem solving personal barriers to planning and/or personally meaningful experiences/ Leisure
Webinar 6: Resources, Mastery, and Connection[2]	1. Be aware of the importance of building resources for retirement (W6Ob1) 2. Build confidence and belief in one's own ability to be in control of their retirement transition (W6Ob2) 3. Understand the importance of connectedness in retirement (W6Ob3)	Concept of mastery and importance of connection, along with sharing resources	No homework

[1]First program implementation: Re-Imagining was a separate session

[2]First program implementation: Connection and a second discussion regarding resources were in a separate session

content for the day's topic along with one-two activities using the online platform Poll Everywhere (www.polleverywhere.com). For example, a Wordle activity was used in the first webinar asking participants to answer the following question using one-word answers: What does retirement mean to you? Top answers included: "freedom," "time," and "relaxation." Finally, each webinar ended with some form of takeaway message, an explanation of that webinar's homework, and reminders for the following week. Outside the webinars, student coaches provided program participants one-on-one support and feedback throughout the program through the participant homework and by email.

3.4 Program Evaluation

Unlike research studies, program evaluation does not require ethical approval from the institutional research ethics board. According to the Tri-Council Policy Statement (TCPS2), the agency that governs research ethics in Canada: "[…] program evaluation activities […] do not constitute research for the purposes of this Policy, and do not fall within the scope of REB review" (*TCPS2 (2018) – Article 2.5, Chapter 2: Scope and Approach*, 2018). Authors confirmed with the host university research ethics board that ethics was not required for this program evaluation. This also means the gathering of evaluation results could not be burdensome to participants and required targeted questions to improve the program rather than questions regarding personal experiences of the program.

The program evaluation was developed based on the intended objectives for each session; evaluative questions were to assess the content and processes as well as participant satisfaction for continued feasibility of the program. Program evaluation was mainly comprised of pre-, mid-, and post-program surveys with varying completion rates among participants. The pre-program survey gathered data regarding age, gender, participants' retirement timeline (e.g., when will you be starting your transition into retirement?), reasons for participating in the program, if participants have done any retirement workshops before and what they were and, finally, Likert scale questions regarding participants' confidence and preparedness in regards to their transition into retirement. The mid- and post-program surveys asked participants to score their satisfaction with each webinar (webinars 1–3 in mid-program survey, webinars 4–6 in post-program survey). Participants were also asked to score the extent to which each webinar objective was met on a scale of 1 to 5 (1 = not at all, 5 = extremely). The mid- and post-program surveys also collected additional comments from participants. The post-program survey additionally collected information regarding how participants chose to attend the program (live session or watching recordings), their confidence and preparedness for their transition to retirement after having participated in the program, and participant feedback on program delivery (e.g., time/day of webinars, favourite topic, topic that can be improved, missing topics, missing resources). Finally, during each webinar, notes were taken regarding participant attendance, participation in learning activities, and any comments made by participants deemed pertinent by the program facilitators.

3.5 Analysis

Statistical analysis was completed using SPSS v.26. Because the number of participants who completed the evaluation surveys was too low for statistical relevance, descriptive analyses helped to frame or contextualize the qualitative data. Descriptive statistics (e.g., counts, means, percentages) were used for demographic data, reports of confidence and perceived preparedness, as well as achievement and ratings for the webinars and their objectives. As the evaluation is used for program evaluation, qualitative comments were simply summarized and organized by similarity in their contents rather than being analyzed through thematic of content analysis as this is not necessary in program evaluation.

4 Results

4.1 Participants and Outcomes

Demographics of participants who completed program surveys, as well as webinar attendance data can be found in Table 2 below. Although information on gender and anticipated retirement timeline was asked, participants were not asked to disclose their role within the university (e.g., staff or academic, full or part-time) or the Department they were affiliated with. Live attendance was noted by facilitators halfway through each webinar to allow for late arrivals. Recording views were tabulated by the learning management system (Brightspace) through which the program was being delivered.

Webinar attendance varied, with a minimum of ten and maximum of 23 live participants, though recordings were available for anyone who could not attend.

Table 2 Summary demographics

	First Implementation	Second Implementation
Average Age	59.5	58.2
Gender		
• Women	21 (77.8%)	15 (88.2%)
• Men	5 (18.5%)	2 (11.8%)
• Did not answer	1 (3.7%)	
Retirement Timeline		
• Less than 1.5 years	7 (25.9%)	6 (35.3%)
• Less than 5 years	14 (51.8%)	11 (64.7%)
• More than 5 years	5 (18.5%)	0
• Not clear/Did not answer	1 (3.7%)	0
Previously attended retirement workshop		
• Yes	20 (74.1%)[a]	10 (58.8%)[a]
• No	7(25.9%)	7 (41.2%)

[a]Previous retirement planning/webinar/workshops attended by our participants included: Financial (e.g., with financial planners; about the Canadian Pension Plan, Old Age Security, University Pension Plan), and Human Resources-hosted retirement courses/workshops

Participants provided several motivations or reasons for participating in this program. Many participants reported wanting to better **prepare** for retirement: "To prepare for a fulfilling retirement"; "To start [preparing] for retirement […] so that it is as seamless and easy as possible"; "I want to make sure I am prepared for retirement, not just financially but mentally as well." Participants also described wanting more **information** to **educate** themselves and build their knowledge regarding what to expect in retirement. Finally, some participants had specific motivations related to their **well-being**, with one participant explaining "I want to see how we can balance still raising kids and retirement", and another describing exactly what they hoped to learn in this program: "Health and wellness aspects of retirement."

Due to the small sample size and attrition of participants participating in the program surveys, **scores of participants' confidence and preparedness** for their transition into retirement are presented in averages. In terms of confidence, the average reported score was a 2.86/5 prior to the start of the program, and a 4.11/5 after the completion of the program. For preparedness, the average reported score before starting the program was a 2.80/5, and a 3.67/5 after the completion of the program.

4.2 Program Satisfaction

In terms of program satisfaction, ratings of each webinar and perceived achievement of webinar learning objectives can be found in Tables 3 and 4, respectively. Webinar ratings were based only on the second implementation due to the changes in course delivery from the first to the second implementation, making it difficult to combine scores. However, learning objectives were reorganized from the first to the second implementation, meaning scores of learning objective achievement of these learning objectives could still be calculated across both implementations.

Participants who completed the program surveys also provided additional comments regarding the program as a whole. Complimentary feedback was provided regarding the approachable and thoughtful facilitation of the program. For example, one participant shared: "The retirement planning sessions were excellent—they really gave me some concrete areas that I need to consider in the lead-up to

Table 3 Webinar ratings

Webinar	Ratings[ab]
Webinar 1: Retirement, Your Transition	4.16/5
Webinar 2: Gains, Losses, and Re-Imagining	4.33/5
Webinar 3: Leisure in Retirement	4.16/5
Webinar 4: What Really Matters	4.50/5
Webinar 5: What Might Stop You	3.75/5
Webinar 6: Resources, Mastery, and Connection	4.00/5

[a]Ratings were based on second implementation only because first implementation outline was different and therefore scores cannot be combined

[b]Anchors provided for webinar ratings were based on the question: "How would you rate webinar #?": 5 = excellent, 1 = poor

Table 4 Perceived achievement of webinar learning objectives

Webinar Objectives	Perceived Achievement[ab]
Webinar 1	
1. W1Ob1	4.56/5
2. W1Ob2	4.37/5
3. W1Ob3	4.71/5
Webinar 2	
1. W2Ob1	4.57/5
2. W2Ob2	4.53/5
3. W2Ob3	4.53/5
Webinar 3	
1. W3Ob1	4.45/5
2. W3Ob2	4.45/5
Webinar 4	
1. W4Ob1	4.42/5
2. W4Ob2	4.14/5
3. W4Ob3	4.42/5
Webinar 5	
1. W5Ob1	3.80/5
2. W5Ob2	3.20/5
Webinar 6	
1. W6Ob1	4.16/5
2. W6Ob2	4.33/5
3. W6Ob3	4.5/5

[a]Ratings were based on second implementation only because first implementation outline was different and therefore scores cannot be combined

[b]Anchors provided for learning objective achievement were based on the question: "To what extent do you feel the following learning objectives were reached through this webinar and its associated homework?": 5 = Excellent, 4 = Good, 3 = Average/Neutral, 2 = Could be better, 1 = Not at all

retirement." Participants also reported enjoying the topics that seemed meaningful to them in terms of the reflective nature of many activities embedded in the program. One participant added:

> …. Last year, I was essentially afraid of retirement and had no idea how to get my head around it. I started planning, however, and have been dealing with the reality of the exit from the office, [host university] requirements and getting our finances in order. These Webinars were a welcome bonus and have really helped me think more deeply about what retirement may or will look like for me.

Finally, many participants mentioned having enjoyed reflecting on, and planning for, the lifestyle component of their retirement transition as it was something they had not considered before. One participant noted:

> It really got me thinking very hard of goals that are important to me leading into retirement such as health, learning new things, keeping busy, more time with family and friends, leisure time (relaxation) and travel (amongst other things). You got me in the right frame of mind that I believe will get me on the right track leading into my retirement.

One common request for any future facilitation of this program would be to have recent University retirees as guest speakers in order to hear from folks who have not only retired recently, but from the same institution. Participants felt this could add value to the information as it would be contextualized by organization-specific experiences. Feedback that could be used for continued program improvement mainly focused on the repetitiveness of topics and the need for more concrete examples and activities. For example, one participant described wanting to create a plan in relation to the resources they have received and how they will explore or use them. As was expected by the program facilitators, participants did occasionally mention wanting information and resources related to financial planning, though the program facilitators reiterated that the focus of the program was on lifestyle as opposed to financial planning.

5 Discussion

It is clear from the literature reviewed that many academics struggle to give up their professional role, social connections within their institution, and what it means to be a highly regarded 'expert' in their field. In considering the question of how universities can better support their workers in this transition from university life, we believe there is merit in helping employees to both re-imagine their lives and selves in retirement and to consider ways to maintain or rebuild valued social connections and roles. Leisure is clearly central to these processes of both innovation and continuity (self-preservation; Nimrod & Kleiber, 2007) and there is ample evidence of leisure's role in supporting both adaptations to and personal growth following other life transitions (e.g., Kleiber et al., 2002).

Program evaluation findings provide evidence to support Kleiber and Linde's (2014) recommendations for leisure education as a tool for assisting people to prepare for their transition to retirement. Further, building on Dattilo's (2015) recommended areas of concentration for leisure education (e.g., developing a leisure ethic, leisure awareness) within a retirement transition context, the retirement webinar program met its intended goals and objectives. Through the retirement leisure education webinars, participants reported increased confidence in feeling better prepared for retirement and enjoyed reflecting on, and planning for, the lifestyle component of their retirement transition that they had not considered before. In addition, the activities incorporated within the webinar sessions are well-aligned with recommendations to incorporate a broader focus on psychosocial and lifestyle factors within retirement planning education (i.e., incorporating social, generative and work-oriented information into retirement seminars, as well as taking inventory of one's own personal and social resources; (e.g., Nascimento & Polia, 2019; Taylor & Schaffer, 2013; Kleiber & Nimrod, 2008). The content and activities were also aligned with participants' reports in our retirement webinar series. As noted, participants reported that their motivation or reason for attending this program was to better prepare for life in retirement (e.g., considerations for health and well-being). Therefore, it appears there is value in universities investing in supporting older employees in preparing for the psychosocial and lifestyle factors associated with the retirement transition.

5.1 University and Human Resources' Role in Retirement Planning (More than Financial)

Recognizing that organizations, including universities, need a plan to gain and retain competitive advantage, human resource (HR) management practices are key (Rau & Adams, 2013). Providing information about aspects of retirement is seen as a key strategy in managing workplace exits within organizations, with pre-retirement financial education a primary focus (e.g., Hershey et al., 2013). Retirement researchers Taylor and Schaffer (2013) argue that nudging or supporting employees in preparing for and deciding to retire necessarily involves education on not only financial planning, but also attending to personal and social needs:

> Incorporating comprehensive financial, social, generative, and work-oriented information into seminars may be more beneficial than focusing on only one aspect. Even group-oriented seminars can incorporate discussions of financial and social needs, since these are likely to be relevant to a number of individuals involved in planning. (pp. 262-263)

And while they and others provide several compelling arguments for attending to the personal and social (in additional to financial) resources and needs (e.g., for social connections, generativity, etc.) individuals bring with them into retirement, we could find no examples of published research on educational programs that addressed these broader lifestyle planning factors. Brown and Jones (2018) indicated that few post-secondary institutions have substantial retirement strategies that help their faculty make the transition to retirement, nor do they provide opportunities to continue to meaningfully engage with the institution post-retirement.

The concept of having ongoing education for the transition to retirement as well as opportunity to retain social connections are also common themes from data collected on retirees in higher education (Brown & Jones, 2018). Brown and Jones explored findings from surveys conducted from 2008, 2012, and 2016 by the Association of Retirement Organizations in Higher Education (AROHE) and found programs and activities that related to purposeful work, advocacy, service, teaching and retirement transition education were top priorities for retirees in addition to keeping connected, maintaining university and community relationships, and preserving university history.

As a result, we are convinced of the return on investment that a leisure education program on retirement lifestyle planning can provide HR departments within universities; it enables the university to be seen as not only socially responsible but also help their employees more clearly envision a life after/outside the university. This supports Nascimento and Polia's (2019) recommendations that, to mitigate against a sense of perceived marginalization and uselessness, universities invest in the creation of groups focused specifically on planning for retirement, including focusing specifically on the factors that prevent them from retiring. In the following section we provide reflections on the program evaluation and recommendations for future program implementation.

5.2 Key Take-ways for Future Program Implementation

In reflecting on our retirement webinars for university faculty and staff, we have identified three key learnings for future program implementations.

The first learning is in relation to financial planning in retirement. As noted previously, in planning for the webinar sessions, we did not want to focus on the financial piece as many retirement planning sessions already do this. Upon reflection, however, we have come to appreciate that planning one's lifestyle in retirement *does* necessarily require considering one's financial resources. Our dilemma is that we are leisure scholars, not financial experts! In future we would invite a financial planning specialist from the university to discuss financial planning as well as incorporate a 'leisure budgeting' exercise where participants are asked to consider the real costs of their current and future leisure-related interests. We anticipate the latter will address fears people often have that they won't have enough money to sustain their lifestyle in retirement.

A second key learning is related to the idea of incorporating 'peer support' opportunities within the program. Beyond facilitating opportunities for informal connections through the discussion board on the virtual learning platform used to support the webinars, or within the webinars themselves, we believe peer-assisted learning could be a key factor in better supporting university workers in planning for the retirement transition. Many participants suggested having individuals who have recently retired from the university to come to the webinar to share their experiences of transitioning into retirement. This supports Brown and Jones' (2018) ideas regarding the role of Retirement Organizations (RO) in universities. ROs, whether developed and organized by senior administrators or entirely by retirees, have shown to have benefits in helping with the retirement transition and provides an opportunity for retirees to maintain social connections with the university community (Brown & Jones, 2018). At our university, we have a 'Retirees and Pensioners Association' that primarily supports informal social gatherings and provides information updates related to the university pension. The most successful ROs tend to be ones that are valued and supported by senior administration and funded by the institution and, depending on their structure (e.g., association, emeriti colleges or retiree centres), can have shared benefits for both retirees and current employees (Brown & Jones, 2018). We believe it would be a highly relevant collaboration if our university's HR department and the 'Association of Retirees and Pensioners' teamed up to offer peer-facilitated retirement planning, drawing on the wealth of 'expertise' within retirees from our university who have lived through the retirement transition.

The final take-away for future research and retirement program implementation is that, in our retirement webinars, we did not consider the job roles and job-related identities that our participants held. Yet, it is clear from the literature of retirement from academia (e.g., Cahill et al., 2019; Dorfman, 2009), the professoriate tends to have a deep, embedded identity associated with their work role making the transition to retirement more challenging. In one of our first sessions of our second webinar implementation, a participant who identified as an academic and researcher inquired if there were specialized content or resources for the professoriate. At first, we were surprised by the inquiry as we had developed the content and resources based on the belief that everyone could benefit no matter of job title. Upon further reflection and deeper dive in the literature on retirement from university life (e.g., Cahill et al., 2019; Ellis et al., 2017; Stebbins, 2019) we have come to believe there may be value to tailor some of the session content to address specific job roles, as well as other barriers related to retirement (e.g., being a caregiver to family in retirement, individuals who live alone or empty nesters in retirement). Post-program implementation we discussed different ways or methods for retirement planning within the university, such as having key sessions that provide everyone with education and skills for retirement planning, and then offering ‘special topics’ in which they can apply the knowledge and skills learned to specific contexts.

5.3 Limitations and Future Research

The evaluation results presented here are limited by number of factors. First, because the program implementation occurred within a University-sponsored retirement lifestyle planning program it could be that the results are positively biased because all the people attended elected to attend on their own non-work time (e.g., lunch hour). Thus, while we anticipate there was some ‘readiness’ to participate in the learning and reflective activities associated with the program, we also think a measure of readiness is required for people to engage deeply with the self-assessment exercises within the program. It would be interesting, in future, to see if similar results would be available from an implementation with an entire administrative/management (e.g., the maintenance staff) or academic unit.

Second, as previously noted, evidence of academics’ experiences of the retirement transition largely informed that program we developed (e.g., Cahill et al., 2019; Dorfman, 2009; Ellis et al., 2017; Nascimento & Polia, 2019; Rowson & Phillipson, 2020). Clearly this literature paints a relatively ‘positive’ view of university life and ignores the breadth of a diverse range of employees’ experiences. For example, the literature ties together people’s role (e.g., as an academic) with their place of employment; in reality someone may love the type of work they do as a researcher or educator but feel alienated from their institution (e.g., because of increasing push for ‘commercialization’ or the changes associated with increased focus on issues related to equity or diversity). Further, as noted, evidence within the peer-reviewed literature of non-academics’ experiences of their work life was very limited and we anticipate other university staff (e.g., food services, facilities maintenance, or contract research staff) may have quite different experiences of work and retirement than the professoriate. Additional studies are needed that explicitly address the beliefs, expectations and perspectives of non-academic employees and seek diverse perspectives of work in and retirement from universities.

Third, related to the above, although there is considerable literature of people’s experiences of the transition to retirement, and the role of leisure in this transition, there were no studies we could find that had previously investigated the use of leisure education to support people in this transition. Kleiber and Linde’s (2014) recommendations for leisure education for the retirement transition, along with Dattilo’s (2015) areas of concentration, served as the primary foundations for program development. Further studies are needed to investigate the use of leisure education to support employees and others in this transition, with a specific focus on identifying the key change factors that are most relevant to helping people prepare for this next life stage. As part of this there would be value to ask participants to identify their key concerns or worries about retiring.

Fourth, because this was a program evaluation study, we felt it was important to reduce the burden on program participants related to data collection. In future there would be value in employing measures used by retirement researchers that more rigorously evaluate readiness for the retirement transition or other aspects of social role identity. Further, completion of the program evaluation surveys was not a requirement for program participation; as a result the low number of responses meant that more robust analyses could not be completed.

Fifth, an additional limitation of the webinars (and, by extension, the evaluation) is that these implementations occurred at the height of the pandemic when all teaching and meeting shifted to virtual implementation. As a result, it could have been university workers—whether faculty or staff—were experiencing high levels of technology (i.e., virtual meetings and teaching) fatigue. Finally, this evaluation study was limited in providing a ‘snapshot’ of participants’ reactions to and perspectives on this program as the sessions were occurring. In future it would be interesting to conduct a study which followed-up participants post-program to see if the program resulted in any decisions to retire, perhaps sooner than originally planned.

6 Conclusion

Retirement in contemporary, industrialized societies is an expected life course transition, and planning has traditionally been focused on finances. However, financial security is not the only barrier that may prevent one from transitioning to retirement; for many there are other losses in departing from their working world such as identity and social connections. Many academics continue to work beyond their eligible years of retirement, and the literature has shown that much of this fear has been associated with potential loss of identity, and loss of ties to their professional community (Cahill et al., 2019; Ellis et al., 2017; Stebbins, 2019). Eisenberg (2006) argues that the first step in planning for retirement should be envisioning the life you want to live in retirement, and then determining what you need in order to live that life.

Overall, there does seem to be merit in a University-sponsored retirement planning education program such as the one presented in this paper, which focuses on reflecting deeply on and planning for various aspects of one's lifestyle in retirement. Clearly there is value for universities to invest in leisure-related retirement planning to not only enact its social responsibility but to assist university workers to imagine and plan for a life outside the university. Hopefully this will dispel some of the hopelessness reflected in Stebbin's (2019) descriptions of what it means to retire from university life.

Exploring ways for ROs to team up with a university's HR department can provide social opportunities that can help with the transition to retirement and provide a valued role for retirees post-retirement. A university is a pillar of the community; having some type of peer-to-peer learning model in which retirees have opportunity to continue to be involved in this valued community will not only help facilitate the retirement transition of its workers as well as strengthen the sense of community associated with university life. We are very lucky to work for a university whose HR department is dedicated to innovative ways to support its workers' well-being by offering funding initiatives such as the Workplace Wellness Grant that funded this project.

Finally, while we focused on the retirement transition, in reality many people who struggle with work-life balance could benefit from stepping back to assess and reconsider their everyday lifestyle and life priorities. Within the productivity-driven culture of universities, leisure can be a potential antidote to this. Finding ways to help university workers achieve greater work-life balance is certainly warranted as academic and work demands increase (Torp et al., 2018) and leisure education seems to be a relevant tool to address this need.

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Declarations

Conflict of Interest The authors declare that they have no conflict of interest.

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