Report on the Academic Staff Retirement & Pensions Survey

Prepared for the Association of Academic Staff: University of Alberta by
Academic Technologies for Learning
University of Alberta

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Quantitative Data Summary

This document will summarize the key quantitative data from the 2004 Academic Staff Retirement and Pensions Survey. The survey was distributed at the end of March, to most Academic Staff, including Faculty, Administrative Professional Officers, Faculty Service Officers, Librarians, Full Time Temporary Academic Staff Members (both Teaching and Administrative), and Research/Trust workers. A total of 2,608 surveys were sent out, and a total of 782 surveys were returned for a response rate of 30.0%. Although a higher response rate would have been welcome, given that the survey was distributed within close proximity to the end of the term, the response rate is reasonable.

Since both retirement and pension information is age related, it is not surprising that older faculty were more likely to respond than younger faculty. In the table below, note the number of responses by age category as well as the expected percent, from information supplied by Human Resources.

<table>
<thead>
<tr>
<th>Age Ranges (n=752)</th>
<th>Real %</th>
<th>Sample %</th>
<th>Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 29 or younger</td>
<td>1.7</td>
<td>1.5</td>
<td>25.4%</td>
</tr>
<tr>
<td>2 30-39</td>
<td>21.8</td>
<td>16.4</td>
<td>22.1%</td>
</tr>
<tr>
<td>3 40-44</td>
<td>16.5</td>
<td>12.5</td>
<td>22.3%</td>
</tr>
<tr>
<td>4 45-49</td>
<td>17.4</td>
<td>16.2</td>
<td>27.5%</td>
</tr>
<tr>
<td>5 50-54</td>
<td>17.6</td>
<td>19.3</td>
<td>32.2%</td>
</tr>
<tr>
<td>6 55-59</td>
<td>14.6</td>
<td>18.0</td>
<td>36.2%</td>
</tr>
<tr>
<td>60 and above</td>
<td>10.5</td>
<td>16.2</td>
<td>45.4%</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>100</td>
<td>30.0%</td>
</tr>
</tbody>
</table>

Note that since not all respondents included the data from which age was calculated, the sample size is smaller than the full sample size.

Because there is a notable discrepancy in the response rate, and age is an important variable in attitudes about Retirement and Pension, most of the data presented in this report will be weighted by age. This will allow the data to better represent the actual campus makeup.

However, the analysis assumes that there are not inherent differences in those choosing to respond versus those not completing the survey. In surveys of this type, there is always a risk that some systemic factors that affect who respond also could affect the responses themselves, in other word, the sample we are going to work on may not represents the population precisely. The larger the response rate, the lower the chance of this happening.
Frequencies

Unless otherwise noted, all the frequencies reported were weighted by age, to reproduce the known distribution of faculty by age.

Chart 1 shows the awareness prior to the survey of the University of Alberta Mandatory Retirement Policy and the University Academic Pension Plan (UAPP).

- A majority of respondents indicated that they were Very Aware of the current University policy around mandatory retirement at age 65. Close to 90% of respondents indicated at least being Somewhat Aware of this policy.
- Awareness of the UAPP was lower. Only about 10% of respondents indicated being very aware and a plurality indicated being Somewhat Aware, with just less than 80% indicated being Somewhat Aware or higher,

Chart 2 indicates:

- Whether respondents were aware that UAPP having a maximum of 35 years of pensionable service
  - A majority indicated that they were aware of the 35 year maximum, with about 40% indicating that they were not aware.
- Awareness of information sessions on campus
  - A stronger majority indicated awareness of sessions on campus, with about 35% indicating that they were not aware of these sessions.
- Whether the respondent had attended these sessions
  - Over 85% of respondents indicated that they had not attended information sessions on campus.
  - A majority indicated that they had not been aware of the MPS, with about 45% indicating that they had been aware.

Respondents were then asked if they expected their salary to exceed the MPS in their career at the University of Alberta.
- Close to a majority (49%) of weighted respondents agreed that they expected to exceed the MPS in their career. Another 18% were unsure with a third answering negatively.

The survey next presented twenty-two statements and asked participants to indicate the degree to which they agreed, disagreed, or were neutral about each statement. Below, in Table 2, the results are presented. The statements are ordered from the highest mean (most likely to agree and least likely to disagree) to lowest (least likely to agree and most likely to disagree).
Almost 65% agreed or Strongly Agreed that “A SRP should not be introduced if it means a reduction in my compensation package”, with only about 15% disagreeing with statement.

- Rating similarly was “It is important to me that my pension should be based on the entire salary earned and not just the portion of it below the MPS.” with over 60% agreeing and close to 13% disagreeing.

- Also closely rated was, “Mandatory retirement should not be eliminated if it means reductions in other areas of my compensation package.”. Here about 60% agreed and 15% disagreed.

A similar proportion responded to, “Extending the age of retirement will make it more difficult to create and competitively fund positions for new academic staff, since existing academic staff will work longer and their positions will not be available for new hires.” and “The ability to take early retirement, prior to age 65, is very important to me.”. Around 60% agreed with each statement and around 20% disagreed.

- Next came, “Twenty-two percent of current academic staff (and about ½ of full professors) have salaries exceeding the Maximum Pensionable Salary. There is a need for a Supplementary Retirement Plan (SRP) for the U of A to be competitive with other top tier Canadian universities that offer this benefit.” With 55 percent agreeing and about 20% disagreeing.

- This was followed by, “Changes to mandatory retirement and pensions are necessary for both recruitment and retention to keep the University of Alberta competitive with other top tier Canadian universities.”, with a slight majority agreeing and about 18% disagreeing.

Then came the statement, “The introduction of a Supplementary Retirement Plan (SRP) would make the University of Alberta a more attractive place for academics to work.” with just under 50% agreeing, around 15% disagreeing, and around 36% responding neutrally.

- The next highest statement, “Mandatory retirement should be kept (as it is now), but have the opportunity to be considered for short-term employment contracts after age 65.”, had a more of a bimodal split than the proceeding items. Over 55% agreed with the statement, but around 23% disagreed.

- This was followed by, “Faculty on post-retirement contracts should be subject to annual Faculty Evaluation Committee (FEC) review and be awarded merit increments and across-the-board percentage increases.” with 52% agreeing and 23% disagreeing.

- Next was, “I have given a great deal of thought to my retirement and pension benefits.” with half agreeing, and about 23% disagreeing.

- “Assuming continuing competence, Academic Staff should have the right to determine when they retire, whether it is at 65 or beyond.” was next with 54% agreeing and 31% disagreeing.
• This statement was rated next, “Eliminating mandatory retirement might adversely affect the quality of academic work at the University, since it will inhibit the University’s ability to renew through hiring new academic staff.” Just under half agreed, and 31% disagreed.
  o After that was, “My interest in my current work is high enough that I expect to be doing my current work after age 65, whether I am with the University of Alberta or not.” About 43% agreed, while about 36% disagreed.
  o The subsequent statement, “Notwithstanding the legality and institutional benefits of mandatory retirement, I believe such a policy is discriminatory on the basis of age.” was agreed to by 41% respondents and disagreed by 35%.
  o Next was, “I believe that a SRP should not be introduced because it only enhances pension benefits for those already making high salaries.” Responses were quite split with this statement having 36% agreeing, 31% disagreeing, and 32% neutral.
• For the remaining statements, more disagreed than agreed. Next, was, “Higher salaries and better benefits today are much more important to me than higher pensions when I retire.” Here, about 30% agreed, 40% disagreed, and 31% were neutral.
  o Very similar proportions were for the statement, “The University Academic Pension Plan (UAPP), as I understand it, is likely adequate to meet my retirement needs.”, though more strongly disagreed and fewer strongly agreed. Here, 30% agreed, 40% disagreed, and 30% were neutral.
  o Next was, “One estimate suggests that the annual payment of a SRP benefit might represent about 1% of the total academic staff benefit expenditure by the University. I would support the introduction of a SRP if the funding of such a program needed to be obtained from other existing benefits.” 27% agreed with the statement, 42% disagreed and 31% were neutral.
  o “Existing performance evaluation systems for academic staff do a good job of addressing “unproductive” academic staff, so the quality of academic work should be maintained if mandatory retirement is eliminated”, was next. Here, 28% agreed, almost 50% disagreed, and 23% were neutral.
  o The subsequent item was, “Mandatory retirement should be kept. However, the retirement age should be increased.” Twenty percent of participants agreed, 42% disagreed, and 38% were neutral.
• “Under the current retirement and pension policies at the University of Alberta, I would seriously consider moving to another university, prior to reaching 65 years of age, to obtain later retirement and additional pension benefits.” had 25% agree and the second highest level of disagreement with 53%.
  o The item with the most disagreement was, “I think the UAPP benefit is so limited that I am considering moving to another University in
order to obtain better pension benefits.” Here only 10% agreed, and over two-thirds disagreed.

Table 2 – Survey Statements

<table>
<thead>
<tr>
<th>Rank</th>
<th>Statements (Weighted by Age)</th>
<th>1 Strongly Disagree</th>
<th>2 Neutral</th>
<th>3 Strongly Agree</th>
<th>4 Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>q28 A SRP should not be introduced if it means a reduction in my compensation package. (n=745)</td>
<td>5.4</td>
<td>9.5</td>
<td>20.7</td>
<td>27.5</td>
</tr>
<tr>
<td>2</td>
<td>q17 It is important to me that my pension should be based on the entire salary earned and not just the portion of it below the MPS. (n=747)</td>
<td>5.7</td>
<td>7.0</td>
<td>24.8</td>
<td>27.3</td>
</tr>
<tr>
<td>3</td>
<td>q12 Mandatory retirement should not be eliminated if it means reductions in other areas of my compensation package. (n=743)</td>
<td>6.6</td>
<td>7.9</td>
<td>25.9</td>
<td>24.7</td>
</tr>
<tr>
<td>4</td>
<td>q23 Extending the age of retirement will make it more difficult to create and competitively fund positions for new acad. staff, since existing acad. staff will work longer &amp; positions not avail for new hires. (n=748)</td>
<td>5.3</td>
<td>13.6</td>
<td>20.3</td>
<td>36.8</td>
</tr>
<tr>
<td>5</td>
<td>q15 The ability to take early retirement, prior to age 65, is very important to me. (n=749)</td>
<td>10.9</td>
<td>10.6</td>
<td>19.5</td>
<td>25.9</td>
</tr>
<tr>
<td>6</td>
<td>q26 There is a need for a SRP for the U of A to be competitive with other top tier Canadian univ. that offer this benefit. (n=747)</td>
<td>8.5</td>
<td>10.9</td>
<td>25.4</td>
<td>29.6</td>
</tr>
<tr>
<td>7</td>
<td>q9 Changes to mandatory retirement pensions are necessary for both recruitment and retention to keep U of A competitive with other top tier Can. univ. (n=749)</td>
<td>6.6</td>
<td>11.7</td>
<td>31.0</td>
<td>26.8</td>
</tr>
<tr>
<td>8</td>
<td>q19 The introduction of a SRP would make the U of A a more attractive place for academics to work. (n=749)</td>
<td>6.0</td>
<td>8.5</td>
<td>35.8</td>
<td>33.1</td>
</tr>
<tr>
<td>9</td>
<td>q24 Mandatory retirement should be kept (as it is now), but there should be the opportunity to be considered for short-term employment contracts after age 65. (n=749)</td>
<td>11.0</td>
<td>12.2</td>
<td>20.8</td>
<td>33.9</td>
</tr>
<tr>
<td>10</td>
<td>q25 Faculty on post-retirement contracts should be subject to annual FEC review and be awarded merit increments &amp; across-the-board percentage increases. (n=744)</td>
<td>11.2</td>
<td>11.6</td>
<td>25.3</td>
<td>31.1</td>
</tr>
<tr>
<td>Rank</td>
<td>Statements (Weighted by Age)</td>
<td>1 Strongly Disagree</td>
<td>2 Neutral</td>
<td>3 Strongly Agree</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>-------------------------------------------------------------------------------------------</td>
<td>---------------------</td>
<td>-----------</td>
<td>-----------------</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>q8  I have given a great deal of thought to my retirement and pension benefits. (n=749)</td>
<td>6.4</td>
<td>16.5</td>
<td>26.9</td>
<td>33.1</td>
</tr>
<tr>
<td></td>
<td>q13 Assuming continuing competence, Academic Staff should have the right to determine when they retire, whether it is at 65 or beyond. (n=751)</td>
<td>13.7</td>
<td>17.1</td>
<td>15.6</td>
<td>29.1</td>
</tr>
<tr>
<td>12</td>
<td>q11 Eliminating mandatory retirement might adversely affect the quality of academic work at the Univ., since it will inhibit the Univ. abilities to renew through hiring new acad. Staff (n=750)</td>
<td>12.2</td>
<td>18.8</td>
<td>20.4</td>
<td>28.1</td>
</tr>
<tr>
<td>13</td>
<td>q14 My interest in my current work is high enough that I expect to be doing my current work after age 65, whether I am with the U of A or not. (n=749)</td>
<td>19.1</td>
<td>16.5</td>
<td>21.1</td>
<td>20.2</td>
</tr>
<tr>
<td>14</td>
<td>q20 Notwithstanding the legality and institutional benefits of mandatory retirement, I believe such a policy is unfair. (n=749)</td>
<td>17.3</td>
<td>18.0</td>
<td>23.7</td>
<td>18.8</td>
</tr>
<tr>
<td>15</td>
<td>q29 I believe that a SRP should not be introduced because it only enhances pension benefits for those already making high salaries. (n=746)</td>
<td>16.2</td>
<td>15.2</td>
<td>32.2</td>
<td>18.0</td>
</tr>
<tr>
<td>16</td>
<td>q18 Higher salaries and better benefits today are much more important to me than a higher pension when I retire. (n=748)</td>
<td>11.9</td>
<td>27.7</td>
<td>30.9</td>
<td>18.9</td>
</tr>
<tr>
<td>17</td>
<td>q16 The UAPP, as I understand it, is likely adequate to meet my retirement needs. (n=748)</td>
<td>15.8</td>
<td>24.1</td>
<td>29.9</td>
<td>25.5</td>
</tr>
<tr>
<td>18</td>
<td>q27 I would support the introduction of a SRP benefit if the funding of such a program needed to be obtained from other existing benefits. (n=737)</td>
<td>24.2</td>
<td>17.9</td>
<td>31.3</td>
<td>15.7</td>
</tr>
<tr>
<td>19</td>
<td>q22 Existing performance evaluation systems for acad. staff do a good job of addressing &quot;unproductive&quot; acad. staff, so the quality of acad. work would be maint. if mandatory retirement is eliminated. (n=749)</td>
<td>24.3</td>
<td>25.3</td>
<td>22.7</td>
<td>17.7</td>
</tr>
<tr>
<td>20</td>
<td>q21 Mandatory retirement should be kept. However, the retirement age should be increased. (n=744)</td>
<td>20.9</td>
<td>21.1</td>
<td>37.8</td>
<td>14.9</td>
</tr>
<tr>
<td>21</td>
<td>q10 Under the current retirement and pension policies at the U of A, I would seriously consider moving to another univ. prior to 65 to obtain later retirement or additional pensions (n=752)</td>
<td>35.0</td>
<td>18.1</td>
<td>21.8</td>
<td>12.0</td>
</tr>
</tbody>
</table>
Next respondents were presented eight different statements and asked to rank the top three top priorities and their three bottom priorities. Based on what they reported, we estimated what the middle was, based on what was not explicitly selected. Each question started “The University needs to:"

- Just over a majority rated “be more comparable with other top tier universities, with respect to retirement and pension policies, to retain talented academic staff.” in the top three, with 26% rating this in the middle, and 21% rating this in the bottom 3.
  - Next was, “continue to provide opportunities for early retirement at age 55 and after”, with 47% rating this in the top third, 20% in the middle, and a third rating this in the bottom 3.
  - “be more comparable with other top tier universities, with respect to retirement and pension policies, in order to recruit talented academic staff” was rated next, with 43% rating this in the top 3, a quarter rating it in the middle, and 31% rating it in the bottom 3 priorities.

- The most bi-modal statement was, “improve its system for evaluating academic staff” with one-half agreeing, only 13% in the middle, and 37% rating this in the bottom 3.
  - The most balanced item was, “constantly be renewed by new academic staff”, with a third rating this in the top 3, 38% rating it in the middle, and 29% rating it in the bottom 3.

- For the last three items more ranked these items in the bottom 3 than either the top 3 or the middle. Next was, “provide the opportunity to work beyond the age of 65” with 19% rating this in the top 3, a third rating this in the middle, and 47% rating this in the bottom 3.
  - Next was, “introduce a Supplementary Retirement Plan (SRP) in addition to the existing UAPP pension”, with 29% rating this in the top 3, 22% rating this in the middle, and 49% rating this in the bottom 3.
  - Finally, “improve the opportunity for staff to achieve 35 years of pensionable service” had 27% of respondents rate it in the top 3, 22% rate it in the middle, and 51% rate it in the bottom 3.

**Demographics**

Except where noted, the demographics are based on the weighted sample of the respondents.

**Gender:** Of those responding 63% reported their gender as male and 37% female.

**Level of Employment:** Ninety-nine percent reported being fulltime and only 1% reported being part-time. The extent is not surprising since the surveys were targeted at fulltime categories.
Annual University Salary: About 5% indicated annual salaries less than $50,000, 31%, indicated salaries between $50,000 and $74,999, another 36% were between $75,000 and $99,999, 20% were between $100,000 and $124,999, 6% were between $125,000 and $149,000, and 2% were at $150,000 or above. Not surprisingly, weighting the sample increased substantially the proportions between $50,000 and $99,999 and decreased the proportions at higher salaries.

Pension Questions: Respondents were asked four pension related questions.

Do you currently participate in the UAPP? Around 95% indicated that they do.

Do you anticipate having 35 pensionable years at the University of Alberta by the time you reach age 65? Over two-thirds indicated that they did not, around 28% indicated that they did, and about 5% indicated that they did not know.

In addition to the University of Alberta pension, are you eligible to receive additional pension income (excluding the Canada Pension Plan - CPP)? Over 30% indicated positively, around 58% indicated negatively, and around 12% indicated that they did not know.

Have you taken or are you taking steps to augment the University of Alberta pension, so you will have adequate income upon retirement (e.g., investments, real estate, or RRSPs)? Close to 85% answered “yes”, 12% answered “no”, and the rest were unsure.

Appointment Status: Of respondents, about two-thirds reported being Faculty, 15%, Administrative Professional Officers (APO), Research/Trust 5%, 4% indicated Librarian, 4% Fulltime Temporary Academic: Administrative/Professional, 3% Fulltime Temporary Academic: Teaching (Sessional), and 3% Faculty Service Officer (FSO).

Tenure: Of faculty responding about three-quarters reported having Tenure. This proportion would have been higher with the unweighted sample.

Faculty or Portfolio: In the table below are the proportions of responses by Faculty or portfolio.

Table 3 – Faculty or Portfolio (Weighted by Age)

<table>
<thead>
<tr>
<th>Faculty or Portfolio (n=722)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicine and Dentistry</td>
<td>21.5</td>
</tr>
<tr>
<td>Science</td>
<td>16.4</td>
</tr>
<tr>
<td>Arts</td>
<td>10.4</td>
</tr>
<tr>
<td>University Administration</td>
<td>8.1</td>
</tr>
<tr>
<td>Engineering</td>
<td>8.0</td>
</tr>
<tr>
<td>Education</td>
<td>6.2</td>
</tr>
<tr>
<td>Agriculture, Forestry, and Home Economics</td>
<td>5.5</td>
</tr>
<tr>
<td>Faculty or Portfolio (n=722)</td>
<td>%</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---</td>
</tr>
<tr>
<td>Library</td>
<td>4.1</td>
</tr>
<tr>
<td>Other</td>
<td>4.0</td>
</tr>
<tr>
<td>Business</td>
<td>3.0</td>
</tr>
<tr>
<td>Nursing</td>
<td>3.0</td>
</tr>
<tr>
<td>Physical Education and Recreation</td>
<td>2.1</td>
</tr>
<tr>
<td>Law</td>
<td>2.0</td>
</tr>
<tr>
<td>Rehabilitation Medicine</td>
<td>1.9</td>
</tr>
<tr>
<td>Pharmacy and Pharmaceutical Sciences</td>
<td>1.5</td>
</tr>
<tr>
<td>Extension</td>
<td>1.1</td>
</tr>
<tr>
<td>Faculté Saint-Jean</td>
<td>0.6</td>
</tr>
<tr>
<td>Native Studies</td>
<td>0.4</td>
</tr>
</tbody>
</table>

*Single:* About 20% indicated that they were single and 80% indicated that they were not.
Examining by Key Variables

In this section, a number of the different variables in the survey are examined in comparison with various other, mostly demographic, factors. The purpose of this analysis is to try to determine where the results presented were mostly uniform among participants, and when it appears that other factors were important. As with the previous analysis, the data reported is weighted by age. The method of analysis used is chi-square, and only results that were significant (at the $p < .05$ level) will be presented. In addition to being statistically significant, results presented also must be intuitively explainable to be included.

Demographics

Appointment Status

Table 4 below shows the responses for appointment status by sex.

- Males were considerably more likely to be faculty, while females were considerably more likely to indicate being an Academic Professional Officer (APO). Females were also more likely to be Full Time Temporary Academic: Administrative/Professional and Librarians.

<table>
<thead>
<tr>
<th></th>
<th>Female</th>
<th>Male</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Faculty</td>
<td>47.4%</td>
<td>76.5%</td>
<td>65.7%</td>
</tr>
<tr>
<td>2 APO</td>
<td>25.1%</td>
<td>9.7%</td>
<td>15.5%</td>
</tr>
<tr>
<td>3 FSO</td>
<td>2.4%</td>
<td>3.3%</td>
<td>3.0%</td>
</tr>
<tr>
<td>4 Librarian</td>
<td>7.2%</td>
<td>2.4%</td>
<td>4.2%</td>
</tr>
<tr>
<td>5 Full Time Temporary Academic: Teaching</td>
<td>2.4%</td>
<td>2.8%</td>
<td>2.7%</td>
</tr>
<tr>
<td>6 Full Time Temporary Academic: Administrative/Professional</td>
<td>8.8%</td>
<td>1.2%</td>
<td>4.0%</td>
</tr>
<tr>
<td>7 Research/Trust</td>
<td>6.8%</td>
<td>4.0%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Table 5 below shows responses for Academic Status by Age Split.

- Of respondents, Faculty tended to be in the older group, Full Time Temporary Academic: Administrative and Research/Trust tended to be in the younger group. Both APO’s and Librarians slightly tended to be older.
  - Not surprisingly, of faculty, older respondents were more likely to have tenure when compared to those younger (95% of older had tenure compared to 58% of those younger).

<table>
<thead>
<tr>
<th></th>
<th>Younger</th>
<th>Older</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Faculty</td>
<td>62.2%</td>
<td>70.3%</td>
<td>65.7%</td>
</tr>
<tr>
<td>2 APO</td>
<td>15.0%</td>
<td>16.0%</td>
<td>15.5%</td>
</tr>
<tr>
<td>3 FSO</td>
<td>3.1%</td>
<td>2.7%</td>
<td>2.9%</td>
</tr>
<tr>
<td>4 Librarian</td>
<td>3.6%</td>
<td>4.8%</td>
<td>4.1%</td>
</tr>
</tbody>
</table>
Table 6 shows this breakdown by income.

- Notable is that faculty make up the vast majority of those in the higher income split and all the other income categories are primarily in the lower income split.
  - Not surprisingly, those with higher income were considerably more likely to indicate that they had tenure (97% compared to 91% of those with lower incomes).

<table>
<thead>
<tr>
<th>Appointment Status by Income Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>(n=674)</td>
</tr>
<tr>
<td>Lower</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>1 Faculty</td>
</tr>
<tr>
<td>2 APO</td>
</tr>
<tr>
<td>3 FSO</td>
</tr>
<tr>
<td>4 Librarian</td>
</tr>
<tr>
<td>5 Full Time Temporary Academic: Teaching</td>
</tr>
<tr>
<td>6 Full Time Temporary Academic: Administrative/Professional</td>
</tr>
<tr>
<td>7 Research/Trust</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

- The make-up of respondents from the Faculty of Medicine was slight different from that of other faculties. The proportion of faculty that responded was slightly less, as was the number of Full Time Temporary Academic: Administrative and the proportion of Research/Trust was higher.
  - Those responding from the Faculty of Medicine were less likely to have tenure when compared to other faculties (68% compared to 77% of other faculties).

- When Professional and Other Faculty are compared, Other Faculty had a higher proportion of faculty respond, while Professional Faculties had a higher proportion of Research/Trust respondents.
  - Those responding from Professional Faculties were less likely to have tenure when compared to Other Faculties (70% compared to 80% of Other Faculties).

Table 7 shows this breakdown by planned retirement age.

- Those retiring at 65 or older were more likely to indicate that they were Faculty (74% compared to 56% of those indicating that they would retire before 65).
• Of those indicating earlier retirement, they were likely to indicate being APO’s (24% compared to 8% of those wanting to retire at 65 or beyond) and Librarians.

Table 7 – Appointment Status by Planned Retirement Age

<table>
<thead>
<tr>
<th>(n=658)</th>
<th>Less than 65 years %</th>
<th>65 years or older %</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Faculty</td>
<td>56.0</td>
<td>74.1</td>
<td>65.7</td>
</tr>
<tr>
<td>2 APO</td>
<td>24.1</td>
<td>8.0</td>
<td>15.5</td>
</tr>
<tr>
<td>3 FSO</td>
<td>2.6</td>
<td>3.1</td>
<td>2.9</td>
</tr>
<tr>
<td>4 Librarian</td>
<td>5.2</td>
<td>2.8</td>
<td>4.0</td>
</tr>
<tr>
<td>5 Full Time Temporary Academic: Teaching</td>
<td>2.0</td>
<td>3.1</td>
<td>2.6</td>
</tr>
<tr>
<td>6 Full Time Temporary Academic: Administrative/Professional</td>
<td>4.9</td>
<td>3.4</td>
<td>4.1</td>
</tr>
<tr>
<td>7 Research/Trust</td>
<td>5.2</td>
<td>5.4</td>
<td>5.3</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Faculty or Portfolio

Table 8 shows the breakdown of respondents by Faculty or Portfolio by Gender.

• The most notable differences by gender are with the Faculty of Engineering (12% of males compared to 2% of females), Faculty of Science (22% males compared to 8% females), Medicine and Dentistry (25% males and 15% females), Nursing (8% females compared to 0.4% males), Administration (14% females compared to 5% males), Library (8% females and 2% males), Other (7% females and 2% males) and Education (9% female and 4% male).

Table 8 – Faculty or Portfolio by Gender

<table>
<thead>
<tr>
<th>(n=716)</th>
<th>Female</th>
<th>Male</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Agriculture, Forestry, and Home Economics</td>
<td>6.0%</td>
<td>5.4%</td>
<td>5.6%</td>
</tr>
<tr>
<td>2 Arts</td>
<td>9.0%</td>
<td>11.4%</td>
<td>10.5%</td>
</tr>
<tr>
<td>3 Business</td>
<td>2.6%</td>
<td>3.3%</td>
<td>3.1%</td>
</tr>
<tr>
<td>4 Education</td>
<td>9.3%</td>
<td>4.0%</td>
<td>6.0%</td>
</tr>
<tr>
<td>5 Engineering</td>
<td>1.5%</td>
<td>11.6%</td>
<td>7.8%</td>
</tr>
<tr>
<td>6 Extension</td>
<td>2.2%</td>
<td>0.4%</td>
<td>1.1%</td>
</tr>
<tr>
<td>7 Faculté Saint-Jean</td>
<td>0.4%</td>
<td>0.9%</td>
<td>0.7%</td>
</tr>
<tr>
<td>8 Law</td>
<td>3.0%</td>
<td>1.3%</td>
<td>2.0%</td>
</tr>
<tr>
<td>9 Medicine and Dentistry</td>
<td>15.3%</td>
<td>25.2%</td>
<td>21.5%</td>
</tr>
<tr>
<td>10 Native Studies</td>
<td>0.7%</td>
<td>0.2%</td>
<td>0.4%</td>
</tr>
<tr>
<td>11 Nursing</td>
<td>7.5%</td>
<td>0.4%</td>
<td>3.1%</td>
</tr>
<tr>
<td>12 Pharmacy and Pharmaceutical Sciences</td>
<td>1.9%</td>
<td>1.1%</td>
<td>1.4%</td>
</tr>
<tr>
<td>13 Physical Education and Recreation</td>
<td>1.5%</td>
<td>2.5%</td>
<td>2.1%</td>
</tr>
<tr>
<td>14 Rehabilitation Medicine</td>
<td>2.2%</td>
<td>1.6%</td>
<td>1.8%</td>
</tr>
<tr>
<td>15 Science</td>
<td>8.2%</td>
<td>21.7%</td>
<td>16.6%</td>
</tr>
</tbody>
</table>
Table 9 shows the breakdown of respondents by Faculty or Portfolio by age split.

- While mostly subtle differences exist when the age split is examined by faculty, a few faculties stand out. Specifically, the Faculty of Arts, and Nursing both have notably older Faculties and the Faculty of Engineering and Science have Younger Faculties.

Table 9 – Faculty or Portfolio by Age Split

<table>
<thead>
<tr>
<th>(n=725)</th>
<th>Younger %</th>
<th>Older %</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Agriculture, Forestry, and Home Economics</td>
<td>5.8</td>
<td>5.1</td>
<td>5.5</td>
</tr>
<tr>
<td>2 Arts</td>
<td>8.2</td>
<td>13.5</td>
<td>10.5</td>
</tr>
<tr>
<td>3 Business</td>
<td>2.9</td>
<td>3.2</td>
<td>3.0</td>
</tr>
<tr>
<td>4 Education</td>
<td>5.8</td>
<td>6.8</td>
<td>6.2</td>
</tr>
<tr>
<td>5 Engineering</td>
<td>9.7</td>
<td>5.8</td>
<td>8.0</td>
</tr>
<tr>
<td>6 Extension</td>
<td>1.7</td>
<td>0.3</td>
<td>1.1</td>
</tr>
<tr>
<td>7 Faculté Saint-Jean</td>
<td>0.2</td>
<td>1.0</td>
<td>0.6</td>
</tr>
<tr>
<td>8 Law</td>
<td>2.4</td>
<td>1.3</td>
<td>1.9</td>
</tr>
<tr>
<td>9 Medicine and Dentistry</td>
<td>20.5</td>
<td>22.8</td>
<td>21.5</td>
</tr>
<tr>
<td>10 Native Studies</td>
<td>0.2</td>
<td>0.6</td>
<td>0.4</td>
</tr>
<tr>
<td>11 Nursing</td>
<td>1.4</td>
<td>5.1</td>
<td>3.0</td>
</tr>
<tr>
<td>12 Pharmacy and Pharmaceutical Sciences</td>
<td>1.4</td>
<td>1.6</td>
<td>1.5</td>
</tr>
<tr>
<td>13 Physical Education and Recreation</td>
<td>2.4</td>
<td>1.9</td>
<td>2.2</td>
</tr>
<tr>
<td>14 Rehabilitation Medicine</td>
<td>1.9</td>
<td>1.9</td>
<td>1.9</td>
</tr>
<tr>
<td>15 Science</td>
<td>18.8</td>
<td>13.2</td>
<td>16.4</td>
</tr>
<tr>
<td>16 University Administration</td>
<td>8.7</td>
<td>7.4</td>
<td>8.1</td>
</tr>
<tr>
<td>17 Library</td>
<td>3.6</td>
<td>4.5</td>
<td>4.0</td>
</tr>
<tr>
<td>18 Other</td>
<td>4.1</td>
<td>3.9</td>
<td>4.0</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

Table 10 shows Faculty or Portfolio by Income Level.

- While many Faculties or Portfolios show a similar proportion in the lower and higher income categories a few do not. These include Arts, Business, Engineering with larger proportions in the higher income group. Portfolios tended to show larger proportions in the lower income group, including Administration, Libraries, and Other.
### Table 10 – Faculty or Portfolio by Income Level

<table>
<thead>
<tr>
<th></th>
<th>Lower %</th>
<th>Higher %</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Agriculture, Forestry, and Home Economics</td>
<td>5.3</td>
<td>6.2</td>
<td>5.6</td>
</tr>
<tr>
<td>2 Arts</td>
<td>8.9</td>
<td>14.8</td>
<td>10.6</td>
</tr>
<tr>
<td>3 Business</td>
<td>2.0</td>
<td>5.7</td>
<td>3.1</td>
</tr>
<tr>
<td>4 Education</td>
<td>6.5</td>
<td>5.7</td>
<td>6.3</td>
</tr>
<tr>
<td>5 Engineering</td>
<td>6.9</td>
<td>10.0</td>
<td>7.8</td>
</tr>
<tr>
<td>6 Extension</td>
<td>1.2</td>
<td>0.5</td>
<td>1.0</td>
</tr>
<tr>
<td>7 Faculté Saint-Jean</td>
<td>0.6</td>
<td>0.5</td>
<td>0.6</td>
</tr>
<tr>
<td>8 Law</td>
<td>1.8</td>
<td>2.4</td>
<td>1.9</td>
</tr>
<tr>
<td>9 Medicine and Dentistry</td>
<td>21.3</td>
<td>22.4</td>
<td>21.6</td>
</tr>
<tr>
<td>10 Native Studies</td>
<td>0.6</td>
<td>0.0</td>
<td>0.4</td>
</tr>
<tr>
<td>11 Nursing</td>
<td>3.1</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>12 Pharmacy and Pharmaceutical Sciences</td>
<td>1.4</td>
<td>1.4</td>
<td>1.4</td>
</tr>
<tr>
<td>13 Physical Education and Recreation</td>
<td>2.4</td>
<td>1.4</td>
<td>2.1</td>
</tr>
<tr>
<td>14 Rehabilitation Medicine</td>
<td>2.4</td>
<td>1.0</td>
<td>1.9</td>
</tr>
<tr>
<td>15 Science</td>
<td>16.1</td>
<td>17.6</td>
<td>16.6</td>
</tr>
<tr>
<td>16 University Administration</td>
<td>9.1</td>
<td>5.7</td>
<td>8.1</td>
</tr>
<tr>
<td>17 Library</td>
<td>4.9</td>
<td>1.9</td>
<td>4.0</td>
</tr>
<tr>
<td>18 Other</td>
<td>5.7</td>
<td>0.0</td>
<td>4.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

Table 11 shows the appointment status by Faculty of respondents. While percentages differ from Faculty to Faculty, this data is presented for informational purposes.

### Table 11 – Faculty or Portfolio by Academic Staff Appointment Status

<table>
<thead>
<tr>
<th></th>
<th>Faculty %</th>
<th>Other Academic %</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Agriculture, Forestry, and Home Economics</td>
<td>6.4</td>
<td>4.5</td>
<td>5.8</td>
</tr>
<tr>
<td>2 Arts</td>
<td>14.0</td>
<td>3.1</td>
<td>10.3</td>
</tr>
<tr>
<td>3 Business</td>
<td>2.5</td>
<td>3.1</td>
<td>2.7</td>
</tr>
<tr>
<td>4 Education</td>
<td>8.5</td>
<td>2.2</td>
<td>6.4</td>
</tr>
<tr>
<td>5 Engineering</td>
<td>9.6</td>
<td>5.8</td>
<td>8.3</td>
</tr>
<tr>
<td>6 Extension</td>
<td>1.4</td>
<td>0.9</td>
<td>1.2</td>
</tr>
<tr>
<td>7 Faculté Saint-Jean</td>
<td>0.9</td>
<td>0.0</td>
<td>0.6</td>
</tr>
<tr>
<td>8 Law</td>
<td>2.1</td>
<td>0.9</td>
<td>1.7</td>
</tr>
<tr>
<td>9 Medicine and Dentistry</td>
<td>23.6</td>
<td>13.9</td>
<td>20.3</td>
</tr>
<tr>
<td>10 Native Studies</td>
<td>0.7</td>
<td>0.0</td>
<td>0.5</td>
</tr>
<tr>
<td>11 Nursing</td>
<td>3.4</td>
<td>2.2</td>
<td>3.0</td>
</tr>
<tr>
<td>12 Pharmacy and Pharmaceutical Sciences</td>
<td>1.4</td>
<td>1.3</td>
<td>1.4</td>
</tr>
<tr>
<td>13 Physical Education and Recreation</td>
<td>2.1</td>
<td>2.7</td>
<td>2.3</td>
</tr>
<tr>
<td>14 Rehabilitation Medicine</td>
<td>2.7</td>
<td>0.9</td>
<td>2.1</td>
</tr>
<tr>
<td>15 Science</td>
<td>20.6</td>
<td>10.3</td>
<td>17.1</td>
</tr>
<tr>
<td>16 University Administration</td>
<td>0.2</td>
<td>24.7</td>
<td>8.5</td>
</tr>
<tr>
<td>17 Library</td>
<td>0.0</td>
<td>13.0</td>
<td>4.4</td>
</tr>
</tbody>
</table>
Table 12 shows the Planned Age of Retirement by Faculty or Portfolio.

- A higher proportion of the following Faculties or Portfolios plan to retire at or beyond 65 years of age: Faculty of Arts, Faculty of Education, Faculty of Medicine and Dentistry, and the Faculty of Science.
  - A higher proportion of the following Faculties or Portfolios plan to retire before 65 years of age: Agriculture, Forestry, and Home Economics; Faculty of Engineering; Physical Education and Recreation; University Administration; Library; and other.

### Table 12 – Faculty or Portfolio by Planned Age of Retirement

<table>
<thead>
<tr>
<th>Faculty or Portfolio</th>
<th>Less than 65 years</th>
<th>65 years or older</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Agriculture, Forestry, and Home Economics</td>
<td>6.8</td>
<td>4.3</td>
<td>5.5</td>
</tr>
<tr>
<td>2 Arts</td>
<td>8.0</td>
<td>12.1</td>
<td>10.2</td>
</tr>
<tr>
<td>3 Business</td>
<td>3.1</td>
<td>2.9</td>
<td>3.0</td>
</tr>
<tr>
<td>4 Education</td>
<td>4.6</td>
<td>7.5</td>
<td>6.2</td>
</tr>
<tr>
<td>5 Engineering</td>
<td>9.9</td>
<td>6.4</td>
<td>8.0</td>
</tr>
<tr>
<td>6 Extension</td>
<td>0.9</td>
<td>1.3</td>
<td>1.1</td>
</tr>
<tr>
<td>7 Faculté Saint-Jean</td>
<td>0.3</td>
<td>0.8</td>
<td>0.6</td>
</tr>
<tr>
<td>8 Law</td>
<td>0.9</td>
<td>2.7</td>
<td>1.9</td>
</tr>
<tr>
<td>9 Medicine and Dentistry</td>
<td>18.5</td>
<td>23.9</td>
<td>21.4</td>
</tr>
<tr>
<td>10 Native Studies</td>
<td>0.3</td>
<td>0.3</td>
<td>0.3</td>
</tr>
<tr>
<td>11 Nursing</td>
<td>3.1</td>
<td>3.2</td>
<td>3.2</td>
</tr>
<tr>
<td>12 Pharmacy and Pharmaceutical Sciences</td>
<td>1.5</td>
<td>1.6</td>
<td>1.6</td>
</tr>
<tr>
<td>13 Physical Education and Recreation</td>
<td>4.0</td>
<td>0.5</td>
<td>2.2</td>
</tr>
<tr>
<td>14 Rehabilitation Medicine</td>
<td>2.2</td>
<td>1.9</td>
<td>2.0</td>
</tr>
<tr>
<td>15 Science</td>
<td>12.0</td>
<td>21.2</td>
<td>16.9</td>
</tr>
<tr>
<td>16 University Administration</td>
<td>13.0</td>
<td>4.0</td>
<td>8.2</td>
</tr>
<tr>
<td>17 Library</td>
<td>5.2</td>
<td>2.7</td>
<td>3.9</td>
</tr>
<tr>
<td>18 Other</td>
<td>5.6</td>
<td>2.7</td>
<td>4.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
<td><strong>100</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

Single

- Females were more likely to be single (30% compared to 14% of males).
- Lower income respondents were more likely to be single (22% compared to 13% for those with higher income).
- Academic staff that were not faculty were more likely to be single (26% compared to 16% of faculty).
Age

Even with the weighting, age was a significant factor by gender.

- Females were more likely to be below 45 years of age (43% compared to 38% of males) and were less likely to be 55 years of age through 64 (27% of males compared to 18% females).
- Higher income respondents were more likely to be 50 and above in age (79% compared to 29% of those with lower incomes). Lower income respondents were more likely to be below 50.

For informational purposes, **Table 13** shows the distribution of respondents that had faculty or other academic status by age.

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Faculty %</th>
<th>Other Academic %</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 29 or younger</td>
<td>0.7</td>
<td>3.4</td>
<td>1.6</td>
</tr>
<tr>
<td>2 30-39</td>
<td>20.4</td>
<td>25.2</td>
<td>22.0</td>
</tr>
<tr>
<td>3 40-44</td>
<td>16.6</td>
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<td>4 45-49</td>
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<td>5 50-54</td>
<td>17.0</td>
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<td>6 55-59</td>
<td>15.9</td>
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<td>7 60-64</td>
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<td>8 65 or above</td>
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<tr>
<td>Total</td>
<td>100</td>
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</table>

- The age range of the respondents interacted with their indicating a retirement preference prior to 65, or at 65 or after. There may be a statistical anomaly here, but those indicating a later retirement were more likely to be 60 or above or between 40 and 44. Those indicated an earlier retirement were more likely to be between 50 and 59, when early retirement is more immediate, or between 30 and 39.

Gender

- Of those indicated planned retirement age of 65 or older were considerably more likely to be male (70% compared to 30% female). Of those indicating retiring sooner, the proportions by gender were closer (55% male compared to 45% female).

Annual University Salary

- Males were more likely to have incomes $100,000 and above (38% of males compared to 14% of females), and females were more likely to have salaries under $75,000 (51% females compared to 28% of males).
• Since age and experience relate to salary, it follows that older respondents were much more likely to earn salaries $100,000 and above (53% of older compared to 11% of younger respondents) and less likely to earn salaries lower.
• Faculty staff were much more likely to have salaries $100,000 or over than other academic staff (41% of faculty compared to 9% of other academic staff). Other academic staff were much more likely to have salaries less than $75,000 (58% compared to 24% of faculty).
• When looking at indicated time of retirement, the differences between salary groups were not too different. Those planning a later retirement were more likely to have a salary of $125,000 or over (12% of those planning to retire at 65 or beyond compared to 5% of those planning to retire earlier). Those planning to retire earlier were more likely to have salaries between $50,000 and $99,999 (70% compared to 62% of those planning to retire later).

Appointment Status Split

• Male respondents indicated that they were more likely to be appointed as faculty (73% male faculty compared to 27% female). For other academic appointments, females were more frequently indicated (57% female compared to 43% male).
• Younger respondents were more likely to indicate Other Academic positions (63% indicated being younger, compared to 54% of faculty).

Awareness

Below are items that were significant around the awareness questions.

• Gender: Males were more likely to be aware or very aware of the current University. Academic Pension Plan (UAPP).
  o Males were also more likely to respond positively to the question “Prior to the survey, were you aware that UAPP has a maximum of 35 years pensionable service?”
  o In addition, males were more likely to indicate that prior to the survey, they were aware of the Federal Maximum Pensionable Salary (MPS) cap.
  o It is possible that these differences between gender reflect the gender differences by age. Females were more represented in the younger categories. Since older respondents were more likely to be aware of pension, this distribution may explain the differences found here.
• Age: Older respondents were more likely to indicate that they were very aware on the statements.
  o Older respondents more frequently indicated being very aware of that the mandatory retirement age was 65, while younger
respondents had a greater likelihood of indicating other awareness levels.
  o Older participants were more likely to indicate being aware or very aware of the current University Academic Pension Plan (UAPP) (52% older compared to 25% younger).
  o Older participants were more likely to be aware of the 35 maximum of pensionable service prior to the survey.
  o Older participants were more likely to be aware of campus offered retirement and pension sessions (71% compared to 49% of younger respondents).
    ▪ Older participants were also more likely to have attended these sessions (29% compared to 5%).
  o Older participants were also more likely to be aware of the Federal Maximum Pensionable Salary (MPS) cap (61% compared to 33% of younger respondents).
  o While these responses are not surprising, the bias towards older respondents awareness shows the need for additional strategies to get the information to younger staff, while more options still exist.

• Based on Salary, those with higher salaries were more likely to be very aware of Mandatory Retirement at age 65 compared to those lower salaries (71% with higher salaries were very aware compared to 46% with lower salaries). Respondents with lower salary were more likely to select the other options.
  o Those with higher salary were more likely to be very aware or aware of the UAPP compared to those with lower salaries. Those with lower salaries were more likely to be somewhat aware to not aware.
  o Those with higher salary were also more likely to be aware that there was a maximum of 35 years of pensionable service (76% for higher salaries compared to 45% for those with lower salaries). Those with lower salaries were more likely to indicate not being aware of this.
  o Those with higher salaries were more likely to be aware of informational sessions. Those with lower salaries were more likely to indicate not being aware.
  o Those with higher salaries were more likely to attend information sessions, while those with lower salaries did not.
  o Those with higher salaries were more likely to be aware of MPS Cap (68% compared to 35% for lower salary respondents).

• When faculty are compared to other types of academic staff, Faculty were more likely to be very aware or aware of the mandatory retirement age of 65. Other Academic staff were more likely to be somewhat or slightly aware.
  o Faculty were more likely to be aware or very aware of the current UAPP, compared to other academics who were more likely to be somewhat, slightly, or not aware of the current UAPP.
• Faculty were more likely to indicate awareness of the max, while those from other Academic Staff were likely to indicate that they were not aware.
  o Those in faculty positions were more likely to be aware of the MPS Cap (51% compared to 38% for other academic staff).

• When those in the Faculty of Medicine are compared to other Faculties and Portfolios, Other Faculties were more likely to be aware of Mandatory Retirement (59% other, compared to 39% Medicine). Medicine was more likely to be between aware and slightly aware.
  o Those from Other Faculties were more likely to be aware of the 35 year maximum, when compared to the Faculty of Medicine (60% for Other Faculties, compared to 37% for the faculty of Medicine).
  o Those in non-Medicine faculties were more likely to indicate awareness of Retirement and Pension sessions on campus. Those in Medicine were more likely to indicate not being aware.
  o Those in non-Medicine Faculties were more likely to be aware of the MPS cap (48% compared to 32% in Medicine).

• When comparing those in Professional Faculties (Medicine, Engineering, Business, Law, Nursing, Ag Forestry, and Rehab Medicine) with Other Faculties, those in Other Faculties were more likely to be aware of the 35 year maximum of Pensionable Service. Professional Faculties were more likely to indicate negatively or being not sure.
  o Those in Faculties not noted as Professional, were more likely to be aware of the MPS cap (50% compared to 39% in Professional Faculties).

• When asked when they were planning on retiring, those planning on retiring before 64 were more likely to be aware of the current UAPP. Those planning to retire at 65 or later were more likely to be less aware.
  o Those planning on retiring before 65 were also more likely to indicate that they were aware of the maximum UAPP 35 years of Pensionable service.
  o Those planning on retiring before 65 were also more likely to have attended an information session on Retirement and Pension.
  o Those planning on retiring before 65 were more likely to be aware of the Federal MSP cap.

### Expect to Exceed Maximum Pensionable Salary (MPS)

• Older respondents were slightly (52% compared to 47%) more likely to indicate that they expect their salary to exceed the MPS in their career and were also slightly more likely to say that it would not (35% of older, compared to 31% of those younger). Younger respondents were more likely to be unsure (22% compared to 14%)
  o This variable may more reflect the decrease of uncertainty as retirement age approaches, then a misconception of younger staff.
• Those with higher salaries were much more likely to expect to exceed the MPS in their career (83% compared to 35% of those with lower salaries). Another 10% of the higher group indicated uncertainty. Those in the lower group either indicated that they would not (44%) or were not sure (21%).
  o It should be noted that the vast majority of those in the Higher Salary group ($100,000+) already either currently exceed or are very close to exceeding the MPS.
• Faculty were considerably more likely to indicate that they expected their U of A salary to exceed the MPS in their career (65% compared to 19% of other Academic Staff).
• Those in the Faculty of Medicine were more likely to be uncertain if their salary would exceed the MPS in their career, while those from other faculties were more likely to indicate that it would not.
• Those planning on retiring at 65 or above were more likely to expect their U of A salary to exceed the MPS in their career.

**Statements**

Q8) I have given a great deal of thought to my retirement and pension benefits.
• Older respondents were more likely to agree or strongly agree that they had given retirement and pension greater thought, while younger respondents were more likely to be neutral or disagree with this statement.
• Those with higher salary were more likely to strongly agree with this statement, while those with lower salaries were more likely to disagree or strongly disagree.
• Faculty were slightly more likely to strongly agree, agree, or be neutral about this statement. Other academics were more likely to disagree.
• Those planning on retiring prior to 65 were likely to agree or strongly agree and those indicating retiring at 65 or beyond were more likely to be neutral or disagree.

Q9) Changes to mandatory retirement and pensions are necessary for both recruitment and retention to keep the University of Alberta competitive with other top tier Canadian universities.
• Older respondents were more likely to strongly agree that changes are necessary mandatory retirement and pension for both recruitment and retention, while younger responses were more likely to agree, be neutral or disagree with this statement.
• Those with higher salaries were more likely to strongly agree than those with lower salaries (36% compared to 19%). Those with lower salaries were more likely to be neutral or disagree.
• Faculty were more likely to strongly agree or agree, while other academic staff were more likely to be neutral or strongly disagree.
• Those planning on retiring later were more likely to strongly agree that changes are necessary, those planning on retiring earlier were more likely to be neutral or disagree to either extent.
Q10) Under the current retirement and pension policies at the University of Alberta, I would seriously consider moving to another university, prior to reaching 65 years of age, to obtain later retirement and additional pension benefits.

- Regarding considering moving to another university prior to 65, males were more likely to agree or strongly agree, while females were more likely to be neutral or strongly disagree.
- Older respondents were more likely to either strongly agree with this statement or strongly disagree with this statement, while younger respondents were more likely to agree, disagree, or be neutral.
- Those respondents with higher salaries were more likely to strongly agree (25% compared to 9% with lower salaries). Those with lower salaries were more likely to be neutral and a bit more likely to be disagree or strongly disagree).
- Faculty members were more likely to strongly agree or agree with this statement (33% compared to 10% of other academic staff). Other academic staff were more likely to be neutral or strongly disagree.
- Those from non-Medicine faculties were more likely to strongly agree, disagree, or strongly disagree with this statement. Those from the Faculty of Medicine were likely to agree, or be neutral.
- Those from other than professional faculties, were more likely to strongly agree. Those from Professional Faculties were more likely to agree or be neutral.
- Those planning on a later retirement were more likely to indicate strongly agree, agree, or neutral. Those planning on an earlier retirement were more likely to strongly disagree (51% for those less than 65 compared to 23% of those 65 and older).

Q11) Eliminating mandatory retirement might adversely affect the quality of academic work at the University, since it will inhibit the University’s ability to renew through hiring new academic staff.

- Younger participants were more likely strongly agree, agree, or be neutral, that eliminating mandatory retirement might be adversely affect the universities to renew through the hiring of new staff. Older participants were more likely to strongly disagree with this statement.
- Those with lower salaries were more likely to agree, be neutral, or disagree. Those with higher salaries were more likely to strongly disagree.
- Other academic staff were more likely to strongly agree, agree, or be neutral. Faculty were more likely to disagree or strongly disagree (37% of faculty disagreed compared to 20% of other academic staff).
- Those planning on retiring earlier were more likely to indicate strongly agree, agree, or neutral might affect the quality. Those planning on retiring later were more likely to disagree or disagree strongly (42% of those retiring later compared to 18% of those planning earlier retirement).
Q12) Mandatory retirement should not be eliminated if it means reductions in other areas of my compensation package.

- Females were more likely to strongly agree and be neutral, while males were more likely to disagree or strongly disagree that mandatory should not be eliminated if it meant reduction in other areas of staff’s compensation package.
- Younger staff were more likely to agree or strongly agree while older staff were more likely to disagree with this statement.
- Those with lower salaries were more likely to agree. Those with higher salaries were more likely to disagree or strongly disagree.
- Other academic staff were most likely to strongly agree or agree. Faculty were more likely to disagree or strongly disagree.
- Non-medicine faculties were more likely to strongly agree, while faculty of medicine respondents were more likely to be neutral or disagree.
- Those indicating an earlier retirement were also more likely to agree or strongly agree that mandatory retirement should not be eliminated if other areas of compensation are reduced. Those indicating a later retirement were more likely to be neutral or to disagree to some degree.

Q13) Assuming continuing competence, Academic Staff should have the right to determine when they retire, whether it is at 65 or beyond.

- Older academic staff were more likely to either agree or strongly agree that staff should have the right to determine when they retire, at age 65 or beyond. Younger staff were more likely to be neutral, disagree, or strongly disagree.
- Those with higher salaries were more likely to strongly agree and were slightly more likely to strongly disagree. Those with lower salaries were more likely to agree or slightly more likely to disagree.
- Faculty staff were more likely to strongly agree (31% compared to 12% from other academic staff). Academic staff were more likely to agree, be neutral, disagree, or strongly disagree.
- Those in the Faculty of Medicine were more likely to agree, and those in other Faculties were more likely to strongly disagree.
- Those indicating retirement at 65 or above were more likely to strongly agree with this statement (35% compared to 13% of those planning an earlier retirement). Those planning on retiring before 65 were more likely to be neutral, disagree, or strongly disagree.
  - These responses indicate that respondents frequently interpreted this question to indicate that the freedom was to retire later, not earlier.

Q14) My interest in my current work is high enough that I expect to be doing my current work after age 65, whether I am with the University of Alberta or not.

- Males were more likely to strongly agree, agree, or be neutral that their interest in their work that they expect to continue this work after 65, while
females were more likely to disagree or strongly disagree with this statement.
  o One possible factor to explain this difference is the higher representation of females in the APO position.
• Older respondents were more likely to strongly agree with this statement, and younger respondents were more likely to be neutral.
• Those with higher salaries were more likely to strongly agree and those with lower salaries were more likely to be neutral or strongly disagree.
• Faculty respondents were more likely to strongly agree or agree (53% compared to 22% of other academic staff). Other academic staff were more likely to be neutral or disagree to some degree.
• Regarding interest, those planning a later retirement were much more likely to agree or strongly agree (60% compared to 24% of those planning an earlier retirement). Those planning an earlier retirement were more likely to disagree or strongly disagree (56% compared to 18% of those indicating a later retirement).

Q15) The ability to take early retirement, prior to age 65, is very important to me.
• One of the more notable differences by gender was regarding the ability to take early retirement. Females were considerably more likely to agree or strongly agree (71% of females agreed or strongly agreed compared to 53% of males) with this statement, while males were more likely to be neutral, disagree, or strongly disagree.
• Younger academic staff were more likely to agree and older academic staff were more likely to be neutral or strongly disagree. When combining agree and strongly agree, 64% of younger respondents agreed, compared to 53% of older respondents agreeing.
• Those with lower salaries were more likely to strongly agree or agree (63% compared to 48% with higher salaries). Those with higher salaries were more likely to be neutral, disagree, or strongly disagree.
• Other academic staff were more likely to strongly agree or agree (73% compared to 53% of Faculty). Faculty were more likely to be neutral, disagree, or strongly disagree.
• Not surprisingly, those indicating retirement prior to 65 were much more likely to agree or strongly agree that early retirement was important (90% compared to 31% of those indicating retirement at 65 or beyond). Those indicating a later retirement were more likely to be neutral or disagree to some degree.

Q16) The University Academic Pension Plan (UAPP), as I understand it, is likely adequate to meet my retirement needs.
• Those with higher salary were slightly more likely to strongly agree with this statement, but were also more likely to strongly disagree. Those with lower salaries were slightly more likely to agree and were more likely to be neutral.
• Other academic staff were more likely to agree or be neutral with this statement. Faculty were more likely to disagree or strongly disagree with this statement.

• Non-Medicine Faculties were more likely to strongly agree or agree with this statement (33% of other faculties compared to 19% of Medicine Faculty respondents). Faculty of Medicine respondents were more likely to disagree with the statement.

• Those planning to retire earlier were more likely to agree or strongly agree that their retirement needs would be adequately met, those planning to retire later were more likely to disagree or strongly disagree.

Q17) It is important to me that my pension should be based on the entire salary earned and not just the portion of it below the MPS.

• Older respondents were more likely to strongly agree that their pension should be based on their entire salary not just what is below the MPS. Younger respondents were more likely to agree or be neutral.

• Those with higher salaries were considerably more likely to strongly agree (60% compared to 25% of those with lower salaries). Those with lower salaries were more likely to respond with the other possible responses.

• Faculty respondents were more likely to strongly agree, where other academic staff were more likely to be neutral, or disagree to some extent.

• Those indicating a later retirement were more likely to strongly agree, and those planning to retire earlier were more likely to be neutral or disagree to either degree.

Q18) Higher salaries and better benefits today are much more important to me than higher pensions when I retire.

• Younger respondents are more likely to Strongly Agree, agree, or be neutral that higher salaries and better benefits today are more important to them than a higher retirement pension (40% agreed or strongly agreed compared to 16% of older respondents).

• Those with currently lower salaries were more likely to agree or strongly agree with this statement (36% compared to 14%). Those with higher salaries were more likely to disagree.

Q19) The introduction of a Supplementary Retirement Plan (SRP) would make the University of Alberta a more attractive place for academics to work.

• Males were a bit more likely to strongly agree that the introduction of a SRP would make the U of A a more attractive place to work, while females were more likely to be neutral or strongly disagree with this statement.

• Older academic staff were more likely to strongly agree, and younger staff were more likely to be neutral.

• Those with higher salaries were more likely to strongly agree, while those with lower salaries were more likely to be neutral, disagree, or strongly disagree.
• Faculty staff were more likely to strongly agree, and slightly more likely to agree. Other academic staff were more likely to be neutral or disagree to some degree.
• Those indicating a later retirement were more likely to strongly agree that the introduction of a SRP would make the U of A a more attractive, those indicating an earlier retirement were more likely to disagree to some degree and were slightly more likely to be neutral.

Q20) Notwithstanding the legality and institutional benefits of mandatory retirement, I believe such a policy is discriminatory on the basis of age.
• Older respondents were more likely to agree that the policy of mandatory retirement is unfair, younger were more likely to agree, be neutral or disagree to some extent.
• Those with higher salaries were more likely to strongly agree. Those with lower salaries were more likely to agree, be neutral, and slightly more likely to disagree.
• Faculty staff were more likely to strongly agree or agree (47% compared to 29% of other academic staff). Other academic staff were more likely to be neutral or strongly disagree.
• Non-Medicine faculty were slightly more likely to strongly agree or disagree. They were also more likely to strongly disagree. Faculty of Medicine respondents were more likely to agree or be neutral.
• Those planning a later retirement were more likely to strongly agree or agree with this statement (52% compared to 18% of those planning an earlier retirement). Those planning to retire before 65 were more likely to be neutral, to disagree, or strongly disagree.

Q21) Mandatory retirement should be kept. However, the retirement age should be increased.
• Older participants were more likely to agree that mandatory retirement should be kept, but the age increased. Younger respondents were more likely to be neutral or disagree.
• Those planning on retiring at 65 or later were more likely to agree or strongly agree. Those planning to retire earlier were more likely to be neutral, and slightly more likely to strongly disagree.

Q22) Existing performance evaluation systems for academic staff do a good job of addressing “unproductive” academic staff, so the quality of academic work should be maintained if mandatory retirement is eliminated.
• Relative to each other, males were more likely to agree or strongly agree with that the performance evaluation system does a good job of addressing unproductive staff (about 33% of males agreed to some degree compared to 19% female), while females were more likely to disagree or strongly disagree (58% of females disagreed to some extent compared to 44% of males).
o This split may also be attributable to the strong female make-up of APO's and male make-up of faculty.

- Older participants were more likely to agree or strongly agree with this statement. Younger participants were more likely to strongly disagree or be neutral.
- Those with higher salaries were more likely to strongly agree or agree with this statement. Those with lower salaries were more likely to be neutral, or disagree to some degree.
- Faculty were more likely to either strongly agree or agree (36% of faculty compared to 12% of other academic staff). Other academic staff were more likely to be neutral, disagree, or strongly disagree.
- Those indicating a later retirement were more likely to strongly agree or agree that existing performance systems worked, while those planning an earlier retirement were more likely to disagree or strongly disagree.

Q23) Extending the age of retirement will make it more difficult to create and competitively fund positions for new academic staff, since existing academic staff will work longer and their positions will not be available for new hires.

- Younger staff were more likely to agree or strongly agree (67% of younger staff indicated this compared to 52% of older staff) that extending the age of retirement would make it more difficult to create and competitively fund positions for new academic staff, while older staff were more likely to be neutral or disagree to some degree.
- Lower salaried staff were more likely to agree with this statement, while higher salary staff were more likely to disagree or strongly disagree.
- Other academic staff were more likely to strongly agree and slightly more likely to agree, while faculty were more likely to be neutral or disagree to some degree.
- Those indicating earlier retirement were more likely to agree or strongly agree with this statement. Those indicating a later retirement were more likely to be neutral or to disagree to some degree.

Q24) Mandatory retirement should be kept (as it is now), but have the opportunity to be considered for short-term employment contracts after age 65.

- Older staff both strongly agreed that mandatory retirement should be kept with the opportunity for short-term employment contracts after 65, but were also more likely to disagree or strongly disagree. Younger staff were more likely to agree or be neutral.
- Higher paid staff were more likely to strongly agree or strongly disagree with this statement. Lower paid staff were more likely to agree, be neutral, and were slightly more likely to disagree.
- Other academic staff were more likely to strongly agree or agree with this statement, while faculty were more likely to be neutral, disagree or strongly disagree.
- Those planning on retiring earlier were more likely to agree that short-term employment contracts should be made available after 65 (67% compared
46% for those planning a later retirement). Those indicating a later retirement were more likely to strongly disagree, disagree, or be neutral.

Q25) Faculty on post-retirement contracts should be subject to annual Faculty Evaluation Committee (FEC) review and be awarded merit increments and across-the-board percentage increases.

- Older staff were more likely to strongly agree that faculty on post-retirement contracts should be subject to annual FEC review, while younger staff were a bit more likely to agree or were neutral.
- Those with higher salaries were more likely to strongly agree, and those with lower salaries were more likely to agree or be neutral.
- Those in the faculty of Medicine were more likely to strongly agree or agree with this statement. Those in other faculties were more likely to be neutral or strongly disagree with this statement.
- Those planning a later retirement were more likely to strongly agree or agree that those on post-retirement contracts should be subject to annual FEC review. Those planning an earlier retirement were more likely to be neutral or disagree to some extent.

Q26) Twenty-two percent of current academic staff (and about ½ of full professors) have salaries exceeding the Maximum Pensionable Salary. There is a need for a Supplementary Retirement Plan (SRP) for the U of A to be competitive with other top tier Canadian universities that offer this benefit.

- Males were more likely to strongly agree with that there is a need for a Supplementary Retirement Pension to be competitive with other top tier universities, while females were more likely to be neutral or disagree.
- Older academic staff were more likely to strongly agree, while younger staff were more likely to agree, be neutral, or disagree to some degree.
- Those with higher salaries were considerably more likely to strongly agree with this statement (52% compared to 14% of those with lower salaries). Those with lower salaries were more likely to select the other options.
- Faculty staff were more likely to strongly agree, while other academic were more likely to be neutral, or disagree to some degree.
- Those planning a later retirement were more likely to strongly agree and were slightly more likely to be neutral around the need for a SRP to be competitive. Those planning an earlier retirement were more likely to agree, disagree, or strongly disagree.

Q27) One estimate suggests that the annual payment of a SRP benefit might represent about 1% of the total academic staff benefit expenditure by the University. I would support the introduction of a SRP if the funding of such a program needed to be obtained from other existing benefits.

- Males were more likely to agree or strongly agree (33% of males, compared to 15% of females) with supporting the SRP (Supplementary Retirement Pension), than females who were more likely to be neutral, disagree, or strongly disagree.
This could also reflect the relatively lower salaries that females have than males.

- Older staff were more likely to agree or strongly agree, while younger staff were more likely to be neutral or disagree.
- Those with higher salaries were more likely to agree or strongly agree (51% compared to 17%), while those with lower salaries were neutral, disagreed, or strongly disagreed.
- Faculty staff were more likely to strongly agree, agree, or were neutral, while other academic staff were more likely to disagree or strongly disagree (62% or other academic staff disagreed, compared to 34% of faculty).
- Non-medicine faculties were somewhat more likely to strongly agree, and were more likely to disagree or strongly disagree. Medicine was more likely to agree.
- Those planning to retire at 65 or older were more likely to strongly agree, agree, or be neutral, while those planning an earlier retirement were more likely to disagree or strongly disagree (52% compared to 34% of those planning later retirement).

Q28) A SRP should not be introduced if it means a reduction in my compensation package.
- Females were more likely to strongly agree or agree that the SRP should not be introduced if it means a reduction in the compensation package. Males were more likely to be neutral, disagree, or strongly disagree.
- Younger participants were more likely to agree or strongly agree with this statement, and older participants were more likely to disagree or strongly disagree.
- Those with lower salaries were more likely to strongly agree and agree. Those with higher salaries were more likely to be neutral, or disagree to some degree.
- Those from other academic staff were more likely to strongly agree (53% compared to 31% of faculty), and were slightly more likely to agree. Faculty were more likely to be neutral, disagree, or strongly disagree.
- Those planning to retire earlier were more likely to strongly agree that the SRP should not be introduced if the compensation package is reduced (48% compared to 28% for those indicating a later retirement). Those planning a later retirement were more likely to be neutral or to disagree.

Q29) I believe that a SRP should not be introduced because it only enhances pension benefits for those already making high salaries.
- Females were more likely to agree or strongly agree that the SRP (47% female compared to 30% male) should not be introduced because it only enhances pension benefits for those already making a high salary and males were more likely to be neutral and to strongly disagree.
  - Females were more likely to have lower salaries and, as a result, were less likely to be above MSP.
Younger respondents were more likely to strongly agree, agree, or be neutral, whereas older respondents were more likely to disagree or strongly disagree.

Those with lower salaries were more likely to strongly agree, agree, or be neutral, while those with higher salaries were more likely to disagree or strongly disagree (63% of higher salary respondents disagreed compared to 18% of those with lower salaries).

Other academic staff were more likely to agree or strongly agree (64% compared to 23% of faculty). Faculty were more likely to be neutral or disagree.

Non-Medicine faculties were more likely to strongly agree or be neutral. Medicine faculty respondents were more likely to agree and were more likely to disagree.

Those planning an earlier retirement were more likely to agree or strongly agree that the SRP should not be introduced (46% compared to 27% of those indicating a later retirement). Those indicating a later retirement were more likely to be neutral, to disagree, or strongly disagree.

Q30) I think the UAPP benefit is so limited that I am considering moving to another University in order to obtain better pension benefits.

Males were more likely to strongly agree, agree, or be neutral about considering leaving to another university. Females were more likely to strongly disagree.

Older respondents were more likely to both strongly agree and to strongly disagree with this statement. Younger respondents were more likely to disagree.

Those with higher salaries were more likely to agree or strongly agree. Those with lower salaries were more likely to disagree or strongly disagree.

Faculty respondents were more likely to agree, strongly agree, be neutral, or disagree, whereas other academic staff were more likely to strongly disagree.

Those from non-Medicine Faculties were more likely to strongly agree, agree, or strongly disagree. Those from the Faculty of Medicine were more likely to be neutral or disagree.

While the differences were milder for this question than some of the others, those indicating a plan to retire later were more likely to agree or be neutral, while those planning an earlier retirement were more likely to strongly disagree.

Rankings

When asked to rank the eight options presented, in Table 14 below presents the percentages and rankings of those selecting the item as one of their top 3 choices by Gender.
• The order of rankings differed by Gender. The two most important factors for females were the need to improve the system for evaluating staff and to continue to provide opportunities for early retirement at 55 and after. Males highest rated item was to be more comparable with other top tier universities with respect to retirement and pension.

• Both genders indicated that providing opportunities for work beyond age 65 was the least likely item to be rated in the top 3.
  o Females were less likely to indicate that introducing a Supplementary Pension Plan was in their top 3 than males.

Table 14 - Ranking of Options in Top 3 Choices by Gender

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<tr>
<th>(Weighted by Age) (based on approximately 713 (~268 females, ~445 males))</th>
<th>Female %</th>
<th>Male %</th>
<th>Female Rank</th>
<th>Male Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. improve its system for evaluating academic staff.</td>
<td>57.6</td>
<td>44.8</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>b. be more comparable with other top tier universities, with respect to retirement and pension policies, in order to recruit talented academic staff</td>
<td>42.1</td>
<td>44.4</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>c. be more comparable with other top tier universities, with respect to retirement and pension policies, to retain talented academic staff.</td>
<td>49.2</td>
<td>53.0</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>d. constantly be renewed by new academic staff.</td>
<td>33.8</td>
<td>31.5</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>e. improve the opportunity for staff to achieve 35 years of pensionable service.</td>
<td>28.6</td>
<td>28.3</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>f. continue to provide opportunities for early retirement at age 55 and after.</td>
<td>50.7</td>
<td>43.5</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>g. introduce a Supplementary Retirement Plan (SRP) in addition to the existing UAPP pension.</td>
<td>25.2</td>
<td>32.6</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>h. provide the opportunity to work beyond the age of 65.</td>
<td>12.9</td>
<td>21.9</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

Table 15 shows the ranking of options by Faculty and APO categorization only for options that were listed in respondents’ top 3.

• While two-thirds of APO’s rated opportunities for early retirement in the top 3 and had it rank first, around 44% of Faculty rated this item the same way.
  o Faculty rated being comparable with other top tier universities first, while with APO’s this ranked 2nd and also rated the similar item around recruiting talented academic staff (2t) higher than APO’s (where the same item ranked 4th).
  o APO’s were also more likely to rate improving the system for evaluating academic staff higher than faculty.
Table 15 - Ranking of Options in Top 3 Choices Faculty and APO’s

<table>
<thead>
<tr>
<th>Option</th>
<th>Faculty %</th>
<th>Rank</th>
<th>APO %</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Improve its system for evaluating academic staff.</td>
<td>41.3</td>
<td>4</td>
<td>56.5</td>
<td>2</td>
</tr>
<tr>
<td>b. Be more comparable with other top tier universities, with respect to retirement and pension policies, in order to recruit talented academic staff</td>
<td>44.0</td>
<td>2t</td>
<td>37.7</td>
<td>4</td>
</tr>
<tr>
<td>c. Be more comparable with other top tier universities, with respect to retirement and pension policies, to retain talented academic staff.</td>
<td>54.5</td>
<td>1</td>
<td>46.6</td>
<td>3</td>
</tr>
<tr>
<td>d. Constantly be renewed by new academic staff.</td>
<td>29.7</td>
<td>6</td>
<td>32.9</td>
<td>5</td>
</tr>
<tr>
<td>e. Improve the opportunity for staff to achieve 35 years of pensionable service.</td>
<td>25.0</td>
<td>7</td>
<td>24.8</td>
<td>6</td>
</tr>
<tr>
<td>f. Continue to provide opportunities for early retirement at age 55 and after.</td>
<td>44.0</td>
<td>2t</td>
<td>67.1</td>
<td>1</td>
</tr>
<tr>
<td>g. Introduce a Supplementary Retirement Plan (SRP) in addition to the existing UAPP pension.</td>
<td>37.7</td>
<td>5</td>
<td>22.6</td>
<td>7</td>
</tr>
<tr>
<td>h. Provide the opportunity to work beyond the age of 65.</td>
<td>23.7</td>
<td>8</td>
<td>11.8</td>
<td>8</td>
</tr>
</tbody>
</table>

Table 16 shows the ranking of the Top 3 by responses age split into Younger and Older.
- Younger responses rated a need to improve the system for evaluating academic staff higher than those older (ranked 1st for younger compared to 4th for older).
  - Those older rated the need to provide opportunities for early retirement higher than those younger (ranked 1st for older, and 4th for those younger).

Table 16 - Ranking of Options in Top 3 Choices Younger and Older

<table>
<thead>
<tr>
<th>Option</th>
<th>Younger %</th>
<th>Rank</th>
<th>Older %</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Improve its system for evaluating academic staff.</td>
<td>58.1</td>
<td>1</td>
<td>38.4</td>
<td>4</td>
</tr>
<tr>
<td>b. Be more comparable with other top tier universities, with respect to retirement and pension policies, in order to recruit talented academic staff</td>
<td>43.8</td>
<td>3</td>
<td>42.7</td>
<td>3</td>
</tr>
<tr>
<td>c. Be more comparable with other top tier universities, with respect to retirement and pension policies, to retain talented academic staff.</td>
<td>53.6</td>
<td>3</td>
<td>49.0</td>
<td>2</td>
</tr>
<tr>
<td>d. Constantly be renewed by new academic staff.</td>
<td>33.8</td>
<td>5</td>
<td>30.7</td>
<td>6</td>
</tr>
<tr>
<td>e. Improve the opportunity for staff to achieve 35 years of pensionable service.</td>
<td>30.6</td>
<td>6</td>
<td>24.9</td>
<td>8</td>
</tr>
<tr>
<td>f. Continue to provide opportunities for early retirement at age 55 and after.</td>
<td>42.3</td>
<td>4</td>
<td>51.4</td>
<td>1</td>
</tr>
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Younger Older

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<tbody>
<tr>
<td>g.</td>
<td>introduce a Supplementary Retirement Plan (SRP) in addition to the existing UAPP pension.</td>
<td>24.4</td>
</tr>
<tr>
<td>h.</td>
<td>provide the opportunity to work beyond the age of 65.</td>
<td>13.3</td>
</tr>
</tbody>
</table>

Table 17 - Ranking of Options in Top 3 Choices by Planned Retirement Age

<table>
<thead>
<tr>
<th></th>
<th>Before 65</th>
<th>65 or Later</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Rank</td>
<td>% Rank</td>
</tr>
<tr>
<td>a.</td>
<td>improve its system for evaluating academic staff.</td>
<td>56.1</td>
</tr>
<tr>
<td>b.</td>
<td>be more comparable with other top tier universities, with respect to retirement and pension policies, in order to recruit talented academic staff</td>
<td>39.6</td>
</tr>
<tr>
<td>c.</td>
<td>be more comparable with other top tier universities, with respect to retirement and pension policies, to retain talented academic staff.</td>
<td>44.1</td>
</tr>
<tr>
<td>d.</td>
<td>constantly be renewed by new academic staff.</td>
<td>36.1</td>
</tr>
<tr>
<td>e.</td>
<td>improve the opportunity for staff to achieve 35 years of pensionable service.</td>
<td>27.3</td>
</tr>
<tr>
<td>f.</td>
<td>continue to provide opportunities for early retirement at age 55 and after.</td>
<td>68.8</td>
</tr>
<tr>
<td>g.</td>
<td>introduce a Supplementary Retirement Plan (SRP) in addition to the existing UAPP pension.</td>
<td>22.3</td>
</tr>
<tr>
<td>h.</td>
<td>provide the opportunity to work beyond the age of 65.</td>
<td>5.9</td>
</tr>
</tbody>
</table>

Table 17 shows the top 3 ranking by the planned date of retirement.

- Those indicating a later retirement were more likely to rank being comparable with other top tier universities to recruit talented staff higher than those planning an earlier retirement (rank 1 compared to 3 for those planning an earlier retirement).
  - Not surprisingly, those planning to retire earlier ranked much higher the need for early retirement than those that would not need early retirement, since they were planning on retiring at 65 or beyond (earlier retirement respondents rated it as number 1 and those planning later rated it as number 8).
  - Also not surprisingly, those planning on being around later were more likely to indicate an interest in opportunities beyond 65 compared to the group that plans to retire earlier (later tied for 5th compared to 8th for the earlier group).
Anticipate Having 35 Pensionable Years
The question read: *Do you anticipate having 35 pensionable years at the University of Alberta by the time you reach age 65?*

- Males were more likely to anticipate having 35 pensionable years by the time reaching 65 (32% for males compared to 21% for females).
  - Because of child raising this finding is not unexpected.
- Older respondents were more likely to anticipate having 35 pensionable years, while younger respondents were more likely to be unsure.
- Those with higher salaries were more likely to positively indicate that they anticipate having 35 pensionable years compared to those with lower salaries. Those with lower salaries were more likely to indicate no or not sure.
- Faculty were slightly more likely to answer positively. Other academics were more likely to be unsure.
- Non-Medicine Faculties were more likely to respond positively. Medicine Faculty respondents were more likely to respond negatively.
- Those indicating planning on retiring before 65 were more likely to anticipate having 35 pensionable years by the time they reached 65. Those planning a later retirement were more likely to answer “no”.

Augmenting U of A Pension
This question read: *In addition to the University of Alberta pension, are you eligible to receive additional pension income (excluding the Canada Pension Plan - CPP)?*

- For the question, females were more likely to answer positively (90% female compared to 82% male).
- There were not differences between age groups of those indicating that they are eligible to receive additional pension income, however older respondents were more likely to answer negatively and younger respondents were more likely to indicate that they were unsure.
- Those with lower salaries were more likely to indicate that they were eligible to receive additional pension income or that they were unsure. Those with higher salaries were more likely to answer negatively.

The next question was:
*Have you taken or are you taking steps to augment the University of Alberta pension, so you will have adequate income upon retirement (e.g., investments, real estate, or RRSPs)?*

- Those planning on retiring earlier were more likely to indicate that they were taking steps to augment their pension (91% compared to 81% of those planning to retire later), while those planning on the later retirement were more likely to answer negatively or indicate uncertainty.
Qualitative Data Summary

Qualitative data was taken from both the pilot survey and the survey distributed to the academic population. There were a total of 788 completed surveys for which qualitative data was entered. Data is presented in terms of respondents’ appointment status: Faculty members, APO and Other (includes: FSO’s, Full Time Temporary Academic Staff Members and Research/Trust staff). Some respondents did not specify their appointment status; these responses are in the fourth category, labeled “No Appointment Status”.

Question 46 of the Survey asked: “In your opinion, what is the most important aspect of retirement and pensions at the U of A today?” while Question 47 asked: “Please tell us what you think! Feel free to comment on any concerns you have, and include any advantages or disadvantages regarding retirement and pensions at the U of A.”

The data below represents the combined responses to these two questions, divided by appointment status.

RESULTS

FACULTY MEMBERS

Of the 788 respondents for the survey, 479 or 67% were Faculty members. Faculty members commented on the following aspects of retirement and pensions:

1. UAPP
2. UAPP/Defined Benefit Plan
3. UAPP/MPS and SRP
4. Benefits
5. Early Retirement
6. Mandatory Retirement
7. Retention and Recruitment
8. Other

1. UAPP

There was a large amount of feedback from faculty members on the UAPP. Most of it was disparate and contradictory from individual to individual. Some faculty reported that the pension plan is pretty good; others reported that the pension
plan is poorly managed and uncompetitive. One individual stated that fair compensation should be close to 60% of salary; another expects 70% of salary upon retirement.
Only a few respondents feel that the pension plan is good in its current state:

- “I believe that the pension is a relatively good one.”
- “I am not in a position to evaluate the U of A pension plan; it seems fine.”

Contributions and Return on Investment

Many faculty respondents expressed their frustrations with high contribution rates and the low return on their investments. The unfunded status of the UAPP transferred from the province has created an uncompetitive pension plan - high contributions for benefits obtained. Respondents indicated a frustration over the unfunded status of the UAPP and reported that changing government policies have had a detrimental effect on their retirement plans and they feel cheated by the new rules. Others expressed their fears that they would not have sufficient pension benefits to support them and maintain their standard of living throughout their retirement; they would like to see an increase in pension income. Four respondents said that they could not rely on the U of A pension alone and that they had or would need other sources of income. Here are some of the comments:

- “Probably the excessive rates at which people pay in compared to what they will get out. One could go elsewhere and pay in less for a comparable pension.”
- “We have just hired a PM who is 65. The U of A will kick me out at 65. Retirement on the current U of A pension means poverty for those without other income. This does not include me.”
- “I am not planning on living on the U of A pension alone for retirement. Having taken a 25% drop in salary to come to the Univ. already was a big hit. If I didn’t already have a sufficient retirement income, I couldn’t have come to the academic environment at all.”
- “I resent being forced to belong to the crap pension plan we have. It is poorly managed (i.e., sub-index returns on investments), and screws us on credited amounts (i.e., TSE [down arrow] our contributions go up for the same benefit; TSE [up arrow] our accounts only credited fixed-rate returns). The pension plan was set up in a time different from today! (Thus, it doesn’t serve the majority of the current staff…)”
- “I think we got shafted when the government forced the current pension plan onto us. The unfunded liability is unfair. We are paying more for smaller benefits. We should take the government to court.”
- “The academic pension will not cover all my expenses after retirement, even if I were to stay to age 65. It is absolutely necessary to have additional savings. The decrease in pension on earnings after 1992 has a detrimental effect as well.”
Security
Faculty respondents indicated that in order for the pension fund to be secure and reliable (i.e., faculty will “get out what they put in”), it needs to be “well managed” and “invested wisely”. Three respondents indicated that the most important aspect of retirement and pensions at the U of A was that they should receive the benefits that they had agreed to when they began their employment. The fund also needs to account for inflation. One respondent was extremely dissatisfied with the plan. A sample of responses on this topic includes:

- “No cuts or adjustments that change what I understood to be ‘in play’ when I took this job. I regard retirement and pension benefits as an agreement between myself and my employer, that was a condition of employment (my decision to accept the job).”
- “The plan should accommodate uncertainty in investment growth”
- “Independent administration by accountable trustees”
- “Ability to cope with inflation even though inflation has been low investment return in recent years has been hopeless so the CLA for pensions of 0.6 is not likely to be good enough for pensions to be adequate.”

Flexibility
Some respondents would like a more flexible pension plan that allows the contributor to make more decisions and accounts for “the different needs of different staff members”. The plan should be fair “for all contributing members”.

- “I’d prefer to manage my own retirement financial plans, rather than be locked into another compulsory plan.”
- Should allow faculty option to opt-out of UAPP and instead use private plans such as TIAA-CREF.
- “While the current benefits and pensions are adequate for most staff, more flexibility to accommodate special needs would be good...[an employee] with too few pensionable years can direct more towards additional pension funds.”
- “I think there should be provisions to either buy years of pension or to retire early and get a cap on pension.”
- “There needs to be the possibility, for new recruits from overseas, to purchase extra years in the UAPP. The cost could be set at a fair level (for the University), but currently this option is unavailable.”
- “My previous employers (Yale University & John Hopkins University) provided such flexible plans. I could direct both my own pretax dollars and the university contribution to a variety of medical and pension plans.”
Changes

Some changes that faculty members suggested were: keep the pension fully funded, have fully indexed pensions or raise indexation to 80% to account for inflation, compensation should be 70% regardless of salary level, and to follow the US model where individual contributions are invested together. Other ideas presented were: scrapping the UAPP in favor of a higher compensation package that could be personally invested, a money purchase plan, increasing the pension percentage from 2% to 3%. Sample comments:

- “A money purchase plan would be more apt to enable recruitment and retention than any of the other maneuvers suggested.”
- “I think the most pressing issue is to increase the pension percentage from 2% to something like 3%. This would yield more pensionable income, alleviate the need to stretch out years of service to 35, encourage early retirement, which would also facilitate new hires, etc.”
- “There might well need to be a trade-off between future scale increases and merit increments and an improved pension plan. At my age and career stage, this would be acceptable. There should be no penalty for retirement after age 60.”

U of A Pension vs. Other Universities

A couple of respondents feel that the pension plan at the U of A is inferior to and not “competitive” enough with plans at other universities. One respondent found the transferability of the pension plan to be problematic.

- “I moved from University with the type of hybrid plan you describe. This plan is definitely superior and a key point of hesitation when moving to the U of A. I was advised to not transfer my service and $’s (which I would have done regardless) as it was allowed that the UAPP was inferior. I contribute a great deal to a plan (incl in funded liabilities) for which I receive nothing—a definite incentive to move elsewhere.”
- “The U of A pension plan is losing value relative to other pension plans because of the lack of a supplementary retirement plan and because of the changes in 1994 which decreased the benefit to 1.4% and blended it with the Canada Pension Plan.”
- “The pension system in the US is vastly superior (403(b)/ 401(k)) when I worked there; they kept track of my contributions and university matching funds and invested it institutionally. I got to know how much my pension was worth, etc. A lot better than lumping it all together and varying contributions based on stock market fluctuations.”
- “Working abroad on soft money is part of an academic career. The UAPP is inadequate to make up for this “lost” time and penalizes mobile researchers.”

Two respondents expressed the idea that portability of pension credits would be attractive in recruiting new faculty members.
• “The UAPP should recognize past service in other pension plans (portability) -- to allow a full pension to be achieved. This would help recruitment of established faculty.”
• “In 1987, I was able to bring pension credits from a previous employer and also to buy up the difference between my previous pension plan and the U of A one. This would be an excellent recruitment benefit today.”

**Education**
A lack of available information on the pension plan is a concern for some Faculty. Respondents stated that more information is needed for both those at the beginning of their career at the U of A and those nearing the end of their career:

• “Junior faculty, like myself, need info sessions on pension/retirement/$ planning. Sessions are often pitched at/attended by senior faculty. It’s difficult to consider implications when you are just starting out and still focused on paying off student loans!”
• “I plan to retire in approximately 3 years. My big concern is that I feel the U does not have a specific office for retirement concerns— in other words, someone knowledgeable I can make an appointment with who would outline for me exactly what my U assets and benefits are post-retirement. Much is a mystery to me that worries me.”
• “…The most important aspect is to ensure that all staff understand the rules around pension and retirement and what it means to them (in terms of dollars they can expect). This should be communicated on a regular basis throughout the employee’s career. The employee can then use this information as part of their overall personal planning for retirement (i.e. RRSP, etc.).”
• “After two divorces, I am not sure what my pension income will be and no one in Human resources can tell me either—ridiculous! Retirement planning is impossible then under this uncertainty.”

**2. Defined Benefit Plan**
Some Faculty respondents were concerned with the implications of the UAPP being a defined benefit plan. Because a defined plan is limited to a maximum of 35 years of pensionable service, those who began their careers later in life—especially women—felt that they cannot achieve a full pension. Three respondents felt that a defined contribution plan would be better at meeting the needs of all individuals. Here is a sample of comments on this topic:

• “Mandatory retirement is discriminatory and gender-biased. Women who raise families and stay at home (in my case, for 10 years) do not achieve the years of service needed for a decent pension prior to becoming 65).”
• “35 yrs of pensionable service. Those of us who raised families and entered academic…late (in our 30s or 40s) are at a tremendous disadvantage in regard to pension.”

• “The University should eliminate mandatory retirement at age 65, so those of us who started work past the age of 30 can build up an adequate pension. We need to be able to work enough years to pay into the pension plan. We should not be discriminated against because we started work as a professor at a later age.”

Four respondents expressed their opinions on the standard of 35 years of service for maximum pension. Two faculty respondents reported that they would be able to accrue 35 years of service before age 65, and two would not. Generally, their comments are summed up by this example:

• “It is a concern that nowadays people don’t start teaching until later in their life (partly due to having PhD and post doc completed prior to employment plus the need for working experiences perhaps outside Canada). They need more time past 65 years in order to get the maximum pension and I think this should be possible for them.”

A few respondents expressed their support for a defined benefit plan:

• “Defined-benefits pension reduces the risk when combined with other pension arrangements. (which tend to be more speculative).”

Another faculty respondent stated:

• “Defined benefits are very safe for the retiree, but costs for those currently employed seem to be open ended. The fund managers do not seem to be accountable for poor performance—they just pass the bill on to us.”

Other

The importance of equitable distribution of costs between lower and higher salaried workers was stressed. One respondent was unhappy with the 1991-1992 change in benefits due to inadequate government funding and another felt recovery from salary losses in the 1990’s was important. One other comment:

• “The most important aspect of retirement and pensions at the U of A is transparency and accountability. The board did not fulfill its promise when it took over the control of the pension plan from the province. The members have the right to know more information about the plan.”

3. MPS and SRP
Many Faculty members feel that the pension cap is unfair—pension should be based on entire salary at time of retirement, and that the MPS should be removed or the cap raised to a more favorable amount. Sample comments are:

- I would raise the MPS so that only 20% instead of 50% of the profession are affected.
- The MPS rule is a major problem. If that rule was not in place the UAPP would be very competitive.
- “The MPS is a real issue!! I am well past the cap and take exception to the fact than any increase in salary that I have had in recent years or might earn in the future will have no bearing on my pension.”
- “Cap on max pensionable salary. Once salary exceeds that, pension doesn’t go up. For some, it removes one of the incentives to keep working.”
- “The MPS is manifestly unfair to those faculty entering the final years of their employment at the U of A. Deductions on salary in excess of MPS are an unjustifiable tax with no benefit to anyone except the provincial government whose management gave rise to the unfunded liability.”
- “That the maximal pensionable salary is significantly lower than my actual salary, lowering the pension that U can expect to receive in retirement. I will be obliged to find post retirement work to maintain current standard of living.”

For those whose salaries are above the MPS, most Faculty members indicated that a Supplemental Retirement Plan would be beneficial. They believe that an SRP would help staff maintain their standard of living, help the U of A remain competitive with other universities; reward productive staff, alleviate the MPS problem, and contribute to faculty retention and recruitment. Other respondents felt that an SRP would be okay as long as benefits were not reduced to compensate for it. Here is a sample of comments regarding the SRP:

- “Lack of supplemental retirement plan. Many of us are contributing a huge amount and will not receive benefits for that (currently almost $848 per month over 7% of gross salary). We desperately need a fair solution to this problem.”
- “A SRP should be immediately introduced in order to solve the MPS limit problem that has developed over the past 20 years.”
- “The MPS is clearly not fair in my situation, because MPS is way below my current salary. I was hired as an assistant prof in 2001, The MPS discourages the retention of young faculty members, and push me to look South for employment. I agree to the establishment of SRP, because it addresses partly the inadequate pension due to the MPS.”
- “Need to introduce a SRP if retirees are to have a reasonable standard of living after retirement.”

Those faculty respondents who do not support the introduction of a SRP state that it benefits those making high salaries, replaces personal financial planning (RRSPs), and takes away from the current salary and benefits package. One faculty member expressed concerns regarding the introduction of a SRP
because he/she is not confident about the way in which the current UAPP is being managed. Some other comments regarding the SRP:

- “Definitely not an SRP. Why is the AAS:UA always so preoccupied with the desires of its most affluent, privileged members?”
- “Any SRP should be voluntary-opt in/opt out”
- “Improve UAPP! Don’t be distracted by the limited potential of SRPs!”

As alternatives to the SRP, faculty respondents prefer to make their own investments because SRPs have no tax benefit; they prefer better salaries, more tenure track positions, and benefits such as better daycare opportunities.

4. BENEFITS

Bridge Benefits

A number of respondents expressed their concern with the elimination of bridge benefits in terms of the negative impact on their retirement planning, the process of elimination, and are upset because they had expected to get these benefits when they retired.

- “We are paying too much for the retirement benefits. Eliminating the bridge benefits was a huge blow to those that work to retire early; bring back the bridge benefits.”
- “You had better not use this survey to screw up our promised benefits on retirement, like you screwed up (misrepresented, miscommunicated) your intentions with bridge benefits. I pay a lot of $ into pension plan and I expect it to be there when I retire. “
- “The fact that we cannot trust our own staff association to adhere to its own processes. Its behavior with respect to bridge benefits was an absolute disgrace, and blatantly dishonest. I no longer trust it.”
- “Removal of bridge benefit for this short period of 2 years is an insult and a travesty! Shame!”
- “I am absolutely disheartened and disgusted by losing bridge benefits. I will probably work one extra year to pay for the loss of these benefits… after 30 years I feel that my retirement plans have been severely compromised.”
- “Loss of early retirement benefits is a sore spot since I subsidized this plan for many years and now I cannot take advantage of it.”
- “Your survey is biased and is reminiscent of the survey and subsequent debate on and abolishment of bridge benefits effective July 2004 in which all alternatives were not thoroughly aired, until a decision was made.”
Changes

Faculty respondents expressed concerns about changes and cuts to current benefits. Four respondents expressed their desire for continued health care coverage, two respondents would like “free tuition for children of faculty” and one respondent suggested the option of contributing a larger portion of one’s “benefit room” towards a better medical plan for people with special medical needs. Other desires were for better daycare opportunities, and improved optical and dental care. Two respondents were against reducing benefits in order to increase pensions. Here is a sample of responses on this topic:

• “Should have continuing health care benefits on retirement --- pay to belong to univ. plan. This is essential.”
• “For me, the most important thing is that I don’t want to lose more current benefits to pay for wealthy full professors. Loss of massage therapy, poor glasses coverage, lack of concern for women issues such as quality on-site daycare.”
• “Overall coverage not likely to be enough to live on and cover potential health care costs. Therefore I have taken steps to include over $ 300,000 in RRSP holdings at retirement plus $ 85,000 y independent pension on top of U of A pension.”
• “I am very concerned that my retirement and benefits package is now shifting, continually, and as I said, I regard this as an employment condition. People make plans, including decisions to stay at U of A, based on these benefits.”
• “I am not so much concerned about the level of my pension. But rather about the termination of other benefits like health and dental care.”

Other

One respondent felt that the benefits package favors those taking early retirement.

5. EARLY RETIREMENT

A number of faculty members would like the option of retiring early, and feel that the pension plan should accommodate this. In general, they believe the early retirement option is jeopardized by poor management of the pension plan.

• “I hope to retire early (at about 56 with 30 years pensionable service). I hope that Early Retirement opportunities are maintained.”
• “Flexibility for early retirement”
• “The pension plan is badly managed. Considering the level of contributions and final pension, the performance is terrible. Especially after the changes of the early 90’s. If you leave early, you are really ripped off.”
6. MANDATORY RETIREMENT

Responses from Faculty regarding mandatory retirement reflect the controversial nature of the issue. There is a perception that the FEC process is ineffective in some faculties. There is emphasis from both sides of the issue as to the importance of the FEC process; performance and competency are key criteria for continuing employment. Here is a sample of responses:

• “Competence at 65 and below is not being assessed. There are many incompetent full professors being kept on before 65 and on contract after 65 without competence evaluation. This severely disadvantages younger faculty and is another example of the greed of the over 55 set who think they “deserve” a job forever at our expense.”

• “Allow intelligent options to mandatory retirement. Productive, internationally renowned individuals should be allowed to stay on as long as they want. They would continue to be reviewed and expectations would be high – they’d have to earn their keep!”

• “I am opposed to mandatory retirement at age 65. Nevertheless I don’t think unproductive people should be allowed to continue their employment. Of course, unproductive people should not be allowed to continue their employment at any age.”

• “It does matter to me that I have the choice to work beyond 65 for a few years. …There should be perhaps a “soft” hurdle that has to be jumped at 65 where those of us who want to stay on are part of a particular type of performance agreement where we stipulate how many years we want to work beyond 65 (and are held to this) and in turn agree to be evaluated on the adequacy of our performance every 2nd year.”

Mandatory Retirement: Abolish

Most Faculty respondents were in favor of abolishing mandatory retirement and describe it as “unfair”, “discriminatory”, “counterproductive” and “unlike many other universities in Canada”. Those respondents who wish mandatory retirement to be abolished state that the policy is inflexible (does not allow for exceptions), and diminishes academic quality. One individual believes it to be a case of loyalty. Another individual indicated that he/she would consider moving to another institution if mandatory retirement was not eliminated.

Some respondents who are against mandatory retirement feel that it plays a critical role in retention and recruitment of staff; staff may choose not to work at the U of A or decide to relocate because of the policy. Here are some comments from those opposed to mandatory retirement:

• “The University should eliminate mandatory retirement at age 65, so those of us who started work past the age of 30 can build up an adequate pension. We need to be able to work enough years to pay into the pension plan. We
should not be discriminated against because we started work as a professor at a later age.”

- “As people continue to live longer, the proportions of seniors and old people continue to rise, there is a worldwide trend of extending the retirement age, which UA would have to address sooner or later. The US has scrapped retirement age, why not Canada & UA?”

- “Mandatory retirement is discriminatory and gender-biased. Women who raise families and stay at home (in my case, for 10 years) do not achieve the years of service needed for a decent pension prior to becoming 65).”

- “I find it impossible to justify mandatory retirement on any rational basis, except for the bureaucratic expediency that it provides a certain way to get rid of unproductive staff. Mandatory retirement is a terrible way to achieve our goal.”

- Mandatory retirement singly means the best people will leave ….. will have to do so at age 55 or even 50; we lose their best years. The average people remain. Overall quality down.

- I support elimination of mandatory retirement at age 65, subject to critical review of performance. I support the idea of such individuals being on short-term, renewable contracts. These individuals should not be eligible for merit increments. I don’t support benefit increases for “stars”.

- I appreciate this survey and hope it will help retain people who are at their peak of their career at 65 (eg. David Schindler) rather than letting them go elsewhere, losing their contributions and diminishing their ability to contribute to the university and community that they have already invested in.

- Get rid of mandatory retirement. It is age discrimination. Let us be judged by our peers on how well we do our job, not on the basis of the year we were born.

- Pushing senior academic staff out the door of the peak of their career … shows a total lack of loyalty by the university that can only result in an … absence of loyalty from the staff. This is already happening!

**Mandatory Retirement: Retain**

Those faculty members who support the current policy of mandatory retirement believe that abolishing mandatory retirement will decrease academic productivity and quality. Those who want to keep mandatory retirement feel that it facilitates staff renewal, and would like to see the option of part-time teaching or post-retirement contracts.

- Mandatory retirement, given the ineffective FEC process in some faculties, currently is one means to renew and to “weed out” non-performers.

- I support mandatory retirement at 65 because of several reasons: 1) encourages faculty renewal, 2) promotes change, whether deemed “good” or “bad”, 3) gets the high-priced prima donnas out, 4) ensures that the duds go, 5) helps eliminate cronyism and the establishment of “old gal”/“old boy” networks!
• Appointments beyond age 65 should only be allowed if faculty members can demonstrate they are covering their salary. I favor freeing positions for younger faculty.

• Mandatory retirement is a generally good system since it creates opportunities for faculty renewal and obviates the potential problem of having to “force out” elderly faculty—who have in most cases given many good years of service—who are no longer functioning at a “high” enough level. But perhaps we could introduce 2 and 3 yr post-retirement contracts with SRP at the discretion of Depts and Faculties.

• “Mandatory retirement at 65 years at the latest. Revitalization of faculty A must.”

• “Maintain the 65 mandatory retirement. Wonderful to have new young academics joining our department.”

• “My preference is for continued mandatory retirement, but with opportunity to continue, perhaps part-time past the mandatory retirement age (which could be increased to, say, age 70)”

• “I’m comfortable with mandatory retirement at 65, but there should be an opportunity for re-employment on 5 year contracts. Re-employment depends on result of serious evaluation of research and teaching.”

• “Mandatory retirement has its pros and its cons. On balance, I believed that it is a good policy for the University provided some employment relationship can be maintained beyond retirement.”

Mandatory Retirement: Changes (or improvements)

One respondent stated that most people want to leave at or before age 65. A number of respondents indicated the need for flexibility in both early retirement and post-retirement employment, and a couple of respondents would like the mandatory retirement age extended. The ability to work part-time after age 65 was indicated as a way to improve the mandatory retirement policy. Here are a few comments:

• “I believe more flexible and imaginative arrangements for older capable staff (say past 60 or even 55 years of age) to permit them more leisure time but to also retain their services on a part-time basis (say, for example, 2/3 to ½ time).”

• “I want to be able to work on a part-time basis after 65. I would like to gradually reduce my work at the university so that I can continue earning some income, & gradually ease into retirement.”

• “More flexible retirement options, including, for example, half-time. University of Calgary experience suggests that there are no major problems with non-mandatory retirement. Current system creates major problems for doctoral supervision after age 60.”

• “Perhaps we could introduce 2 and 3 yr post-retirement contracts with SRP at the discretion of Depts. and Faculties.”
• “Forced retirement is not good. Having unproductive faculty beyond 65 is not good. However, we should allow productive faculty to remain active after 65 if they choose to. One way to do that is to ask faculty to reapply after 65, and if accepted, based on their productivity (FEC) rehire them for one to three years probation.”

• “I am sixty. I have no grey hair and run marathons. I am not at my academic zenith. If the U of A thinks I am not contributing, fire me before or after 65! Do not use 65 as an excuse for bad management.”

Other

• “The opportunity to continue working in my lab past age 65 is more important than $/mo. pension. Emeritus status is not enough—for I will lose my lab space that is necessary to continue productive research.”

• “That the previous generations were offered incentives to retire that I’ll never see, and that it will not be easy to decide when to retire. I fault nothing but demographics and economic realities beyond the control of the university (as an employer).”

7. RETENTION AND RECRUITMENT

A couple of respondents indicated that retention is “an issue”. Contrarily, a few other respondents indicated their frustration with the retention of staff; one respondent felt that space was going to be an issue if older staff continued to work past 65. One individual made the following unique comment:

• “The baby boom generation should not be allowed unfettered access to everything, i.e. I had to postpone getting a good job for 10 years because of a freeze of hiring. Now the boomers want to work longer and prevent younger people getting jobs. People with a 60, 000$ a year pension at 65 who want to work, can. They become emeritus, work for free, and mentor younger people. If they want to do it for money, then they are robbing from the younger generations, and are truly selfish.”

Retention:

• Encourage less productive individuals to leave.
• SRP is crucial for retention.
• Pension issues, as well as lack of tuition support for children definitely make UA less attractive over the next 5 years.
• The issue identified above (removing the cap on pensions) is critical for retention!
Recruitment:

- The UAPP should recognize past service in other pension plans (portability) to allow a full pension to be achieved. This would help recruitment of established faculty.
- Recruitment of good young faculty should be a priority. Better salary, more tenure track positions, better daycare opportunities etc.
- We must renew constantly our academic staff and provide salaries and benefits high enough to recruit and retain the very best.
- In 1987, I was able to bring pension credits from a previous employer and also to buy up the difference between my previous pension plan and the U of A one. This would be an excellent recruitment benefit today.
- A money purchase plan would be more apt to enable recruitment and retention than any of the other maneuvers suggested.

8. OTHER COMMENTS

Four respondents stated that they think salaries need to be increased. Single respondents mentioned the following issues but did not give details:

- Ensure generational equity
- Loyalty issues weigh down the system and leadership
- Information sessions should be better advertised.
- Every member should be given a choice.

Administrative Professional Officers (APO)

Of the 783 respondents for the survey, 108 or 15% were Administrative Professional Officers. APOs contributed comments on the following topics:

1. UAPP
2. UAPP/SRP and MPS
3. Benefits
4. Mandatory Retirement
5. Retention and Recruitment
6. Early Retirement
7. Other

1. UAPP
APOs responded to the survey with several additional comments about the UAPP in general categories such as: satisfaction with the UAPP, return on investment, total compensation, defined benefits, and equity issues.

A couple of APO respondents indicated that the UAPP is satisfactory the way it is. Here is one comment:

• “Retirement planning must be an individuals’ responsibility to earn enough right now to continue to invest so that in 25+ years I can retire comfortable- its also important to work for a company that provides some (but not all) retirement planning. U of A is the best of both systems right now.”

Contributions and Return on Investment
There were a number of comments regarding pension contributions. In general, APO respondents felt that it is important to have adequate levels of pension benefits to retire comfortably and that their investments provide a good rate of return. One respondent felt it is important for the U of A to match his/her contribution; two respondents were concerned that pension rates are too high. Here are some of the comments regarding contributions and return on investment:

• “The purpose of a pension plan is to provide a reasonable post-retirement income for employees without mortgaging the present with high contribution rates. Most people have the greatest demand for income during the working years so it doesn’t seem reasonable to struggle in the present to pay for a high level of pension we may never even [need]?”
• “Pensions should provide enough money for individuals to maintain the standard of living to which they have become accustomed.”
• “I don’t want to contribute to a plan that I will receive no benefits from because it is all gone before I reach retirement age.”

Pension Package
Two APO respondents expressed a need to focus on the total compensation package.

• “I believe that the University’s salary and benefit package is extremely generous (for a publicly funded institution, as well as in comparison to many private companies). IF the University is going to look at pension, etc-then suggest that we look at the total benefit package. Too often we deal on the “one off” in a haphazard fashion. We should be looking at total compensation and giving the individuals some flexibility on how they spend their (and the U’s) benefits dollars. Increases in salary and benefits often mean budget cuts or no new staff for new initiatives. I would rather have less “increase/expansion” of existing remuneration, and have more
qualified/skilled resources which will in turn provide a better (and more rewarding) work environment.”
- “It’s disconcerting that we are surveyed on various pieces of compensation with respect to retention-but not asked to look at the package as a whole. I would like more information (or to be surveyed) on total compensation so that I am confident there is actually a strategy in place towards same.”

Defined Benefit Plan

Four respondents indicated that it was important for the UAPP to be a defined benefit plan. One comment was as follows:

- “Defined benefits plan. Pension indexing-could be increased to 100% of cost of living index (same as federal gov't plan).”

Equity

Three respondents stressed the importance of equity in the UAPP; they did not want lower-paid employees to support the pensions of the higher paid employees. Treating all employees (including APOs) fairly, was important to two individuals.

Other

There were several other comments regarding the UAPP. One APO respondent would like to contribute to the UAPP with cash rather instead of purchasing RRSPs; one person would appreciate the option of opting out of the pension plan; another would like to ability to take the pension elsewhere. The ability of research associates and post docs to participate in the UAPP was important to one individual. Two APO respondents experienced difficulties obtaining information from Human Resources. Awareness and predictability around the UAPP was important to two respondents.

2. SRP/MPS

Opposition to the SRP appears to be an equity issue resting on the assumption that it disadvantages lower income earners and benefits higher income earners. APOs reported that they are unwilling to give up any income or benefits to invest in a supplemental plan. One respondent felt that staff making more than the MPS should have options to increase their benefits.

- “Please do not reduce APO, library, FSO benefits or increase these groups’ costs simply to accommodate faculty pension increase. Faculty should not benefit at the cost of your other constituents. If faculty want an SRP, they need to cover it; few APOs or others would benefit.”
• “Regarding SRP’s - I am opposed to introducing any benefit that does not have the potential to be a benefit for all academic staff, particularly if providing this benefit will result in an erosion of other benefits or increase costs of benefits.”
• “I think that the cost of an SRP should be born by those choosing it - it should not take away from the benefit compensations of lower earners - similar to options for increased insurance/dental/etc.”

3. BENEFITS

Bridge Benefits
Comments made by APO respondents regarding benefits were concentrated on the elimination of bridge benefits. One respondent said that the loss of bridge benefits “caused many good people to take early retirement”, and two expressed the need for an alternative to these benefits.

Representation
With the issue of bridge benefits, APOs do not feel that they were well-represented by the AAS:UA. Some of the qualitative comments were:

• “I worked here for 30 years with the understanding that early retirement bridge benefits would be available to me on retirement (early). Suddenly, AAS-UA agrees to drop these (minimal … to big picture at the U). I was forced to retire earlier than I wanted to in order to get them. Makes U of A look Bad).”
• “Removal of bridge benefits for Academic staff is a disgrace. More so when the non-academic staff association rejected this ridiculous proposal. Why was it not phased in so that people who have contributed to the University can get this benefit. AAS:UA is a puppet of Administration.”
• “I don’t think that APO’s were well represented by AAS:UA regarding the termination of bridge benefits and I am concerned that they will not be fairly treated if an SRP is implemented.”

Changes
A couple of respondents were concerned with the sustainability of the current benefits. Another respondent said the following:

• “Having a full benefits package available now along with a reasonable salary roll is most important. Too many people don’t live for today: live only for retirement, many won’t make it to 65… a high quality life after 65.”
4. MANDATORY RETIREMENT

Responses from APOs regarding mandatory retirement were varied. Whether agreeing with the mandatory retirement policy or disagreeing with the mandatory retirement policy, many APOs were in favor of a tighter performance and competency model. One respondent reported on the variability of the FEC process across different faculties. A couple of respondents indicated that retirement age should be more flexible. A sample of comments:

- “Mandatory retirement s/b replaced with a merit-based system - i.e. productive and valued members of the academic community should be retained as individuals.”
- “Regardless of whether there is a decision to eliminate mandatory retirement or not, the U of A is challenged to balance the institutional need for competency with the individual’s desire to stay active and continue to participate in intellectual life. Unfortunately, this judgment call for both the individual and the University, is a very difficult one.”
- “This University has far too many staff who are not productive (per the salary they are receiving), and who will continue to work until 65. Without the mandatory retirement, they will stay forever. This applies to both Academic and Support. Try doing performance review in a union environment.”
- “Mandatory retirement is essential to great quality of education. Old profs need to be replaced --- kids today demand a lot and young, intelligent, enthusiastic professors can deliver!”

5. RETENTION AND RECRUITMENT

There were few comments regarding retention and recruitment. One respondent felt that a balance between recruitment of young faculty and retention of older faculty is important; another respondent stressed the need for competitive benefits in order to attract new staff.

6. EARLY RETIREMENT

The ability to retire early was important to several APO respondents. One respondent referred to the negative effect that the loss of bridge benefits has on early retirement and another felt that retirement at 55 is important because he/she would never reach the maximum of 35 years of service. Other comments:

- “Retirement at 55 with reduced load leading to retirement with those yrs fully pensionable. This is extremely important to me.”
- “Find initiatives to facilitate easy retirement e.g. buy-out packages, etc. Keeps staff young …”
OTHER APPOINTMENT STATUS

Other staff at the University of Alberta included: Faculty Service Officers, Librarians, Full Time Temporary Academic Staff Members and Research/Trust staff. Respondents in this category made up 18% of all respondents. Comments were on the following topics:

1. UAPP
2. UAPP/Maximum 35 years of pensionable service
3. UAPP/SRP
4. Benefits
5. Mandatory Retirement
6. Retention and Recruitment
7. Early Retirement
8. Other

1. UAPP

Contributions and Return on Investment

Respondents were concerned with the sustainability of the current benefits; they want to have enough income to retire comfortably but aren’t sure that the funds will be there in the future. One respondent said that the system should be sustainable without increases in government funding. A couple of respondents were concerned about the upcoming retirement of the “baby boom generation” and felt that this would be a burden on the pension fund. Another commented on poor pension management. Here is a sample of responses:

• “Sustainability. It is important that these benefits continue to be available and uninterrupted for current and future retirees.”
• “I think that the return on our investment into the pension is way too low. You need new financial advisors; it is unacceptable to get < 10% return on this investment. I would rather invest the money myself.”

A couple of respondents thought the UAPP is good the way it is; one contributed that his/her financial advisor found the plan to be “unbelievably good compared to other employers”, and the other respondent said the following:

• “The pension system guarantees income at retirement. In these days and age of uncertainty, this is a very good benefit. If academic staff feels that their future pensions are too low, they should open RRSPs or some other retirement accounts to make up for it and not have the university pay for it.”
Equity
Two respondents stressed the importance of equity in pensions across pay levels.

Education
Two respondents expressed the need for education around pensions; one was never aware of retirement seminars until after they had taken place, the other expressed the need for “adequate preparation and communication”.

Other
Some other comments were: to ensure that the pension fund is being invested wisely, and to remove the CPP integration with the plan. One respondent felt that long-term sessionals should have the option of contributing to the UAPP. Another respondent expressed that those who join the U of A at mid-career are disadvantaged in the pension plan:

- “The current system is strongly skewed to those who spend the most years of their career at the U of A. Those who come here in the middle of their career are at a distinct disadvantage in terms of financially breaking even between contributions and pension benefits.”

2. UAPP/Maximum 35 Years of Pensionable Service

The maximum of 35 years of pensionable service was a concern for one respondent. He/she referred to the difficulty that nursing professionals have in reaching 35 years of service and felt that there should be good retirement benefits for those with less than 35 years. One respondent from the “Other” group would like to contribute beyond 35 years of pensionable service:

- “Would like to contribute (in concert with University) beyond 35 years (would give me 40 years at age 65).”

3. UAPP/SRP

Seven respondents in the “Other” category were against the introduction of a SRP. They perceive that it is inequitable, is not a recruitment incentive, should not be set up at the cost of other benefits, and are unwilling to pay for it:

- “SRP’s to benefit the small % at the top further skews the equity of the system, and would do little to assist renewal-pension plan is not the best
recruitment incentive, and should certainly not be set up at a cost of other benefits.”

- “The cost is huge! It is too large for young people attempting to feed their kids and survive on one salary. And a “supplementary” plan, therefore, should not COST anymore either directly or indirectly. (eg) through loss of other benefits.”

4. BENEFITS

Bridge Benefits
The absence of bridge benefits and its negative effect on early retirement plans was a concern expressed by a number of respondents in the “other” category. One respondent would like to see an alternative to bridge benefits “to buy into”. Comments can be summed up by this example:

- “Bridge benefits are very important. Some staff in our unit would not consider early retirement without them. Removal of bridge benefits would keep people from retirement who should retire or who want to retire (who might remain but be unproductive).”

Changes
“Other” respondents expressed a variety of concerns about changes and cuts to current benefits. Two respondents were against reducing the currently poor benefits in order to increase pensions (e.g., through SRP) of staff making high salaries. Another respondent said the following about benefits:

- “…I also feel that (although not part of this survey) that retiring staff should have the option to pay their own premiums (US university doing so) to retain benefit packages within the group policy. Because I have a “preexisting” medical condition—it will not be covered by outside insurers when I leave the group plan. My new premiums would be higher than if I picked up my portion of the premium for the University Plan.”

5. MANDATORY RETIREMENT

Responses in this category were mixed, with equal numbers in agreement and disagreement. However, there is general agreement that employment should be based on competence or an employee should have the option of working as long as able. Another respondent referred to problems in the FEC process. Gender equity was also mentioned. Here is a sample of responses regarding mandatory retirement:
• “In my experience, the university is quite prepared to reward mediocrity. The abolition of compulsory retirement at age 65 would give mediocrities earning a high salary incentive and opportunity to stay on, thereby blocking appointments for younger scholars, unless evaluation becomes considerably more rigorous than it is now.”

• “I feel strongly that mandatory retirement must be abolished. It is discriminatory and against human rights codes. The vast majority of staff here will retire before age 65, but for those few of us who want to work on (and remain productive) we should have the right to do so!”

• “Retain mandatory retirement and stop listening to those with maximum pensionable service and high salaries who are still whining about retirement.”

• “People age differently which cannot be dealt with strict age limits. Apply FEC evaluations to get unproductive members out, but accept the variation in aging!”

• “It is also clear that there are gaping holes in the faculty yearly evaluation procedures and that games are being played.”

• “Not so that senior employees can maximize their salaries and benefits, but because female employees, especially academic ones, often begin their career at a later age!”

6. RETENTION AND RECRUITMENT

One respondent felt that the abolition of mandatory retirement (without an effective FEC process) would allow “mediocrities” to stay on, and block the appointments of younger scholars. One respondent emphasized the need for training and funding of new staff. Another respondent indicated that the introduction of a SRP is not the best incentive to recruit new staff. The other respondents acknowledged the importance of renewal, but were in favor of retaining experienced staff. One comment:

• “I agree that recruitment of new individuals does offer the advantage of “renewal”. However retention of employees who have established themselves has advantages of continuity and less $ for orientation and initial training.”

7. EARLY RETIREMENT

Three respondents indicated that they wanted the option of retiring early with good benefits. A couple of respondents commented on how the absence of bridge benefits would negatively affect the plans of people wanting to retire early. Another respondent felt that early retirement provisions are too generous and that the cost should not fall on those who stay to 65.
One respondent felt that re-employment up until retirement age (65) is important in allowing staff to complete their research and grad student supervision. There was one suggestion to have career counseling. Two of the “Other” group wrote about the vesting period, and about the Faculty Lecturer position.

- “It would be useful to reducing the vesting period to help junior people who wish to advance their career by moving to another university.”
- “There needs to be an increase in Faculty Lecturer positions. These are individuals with Master Degree preparation who can be hired full-time to provide clinical supervision of students. These individuals would then be eligible for full pension benefits as opposed to the current Sessional 8-9 month contracted agreements.”

The following is an excerpt from a comment made by a temporary Trust employee who was upset and felt that the University is indifferent to staff who are not full time faculty members. He/she did not feel adequately represented by the AAS:UA.

- “The recent saga of employee contracts is just one of several issues that need to be re-examined with a view to considering whether there is a conflict of interests here. Having spent several years doing research and writing grants and papers and building a reputation in science outside of this University for someone else, I am expected to just walk away when my employer retires, when I know that this individual has prevented me from getting faculty positions at this university in order to prevent having their deceptions from being discovered.”

**NO APPOINTMENT STATUS**

Some respondents did not specify their appointment status on the survey. Nine percent of responses fell into this category. Responses to the survey included the following categories:

1. UAPP
2. UAPP/MPS and SRP
3. Benefits
4. Mandatory Retirement
5. Retention and Recruitment
6. Early Retirement
7. Other
1. UAPP

Survey respondents expressed their desire for a pension plan that would allow them to retire early, but without any penalty for doing so. A reliable and adequate pension is important; one comment was about the need to keep up with inflation. One respondent said that the pension plan should be configured based on a retirement age of 65 and to compensate staff accordingly. Having a 100% index linked pension was suggested by one respondent as a way to improve the UAPP. Another stated that teaching summer courses should count as pensionable salary. A sample of comments:

- “Pensions—or saving for retirement is important to me; however, I feel it is a joint individual and employer responsibility. I’m doing my part and I expect the U of A to do the same.”
- “I am in a 9-month per-year appointment, though I work a 6-week summer course, which, I understand, (the 6-wks) is not counted as pensionable salary. I think that extra session taught should count.”

Education

The need for more education around pensions and benefits can be summarized with this comment:

- “I have no idea about how much approximately I can receive on salary if I’ll have served for 30 years. 40% or 70% or % of my highest salary?”

2. MPS AND SRP

One respondent felt that the pension cap does not ensure a fair and equitable system of pension benefits. Two respondents commented that a SRP is favorable but not at the expense of benefits or larger pension contributions. One person prefers improving the quality of work life, and providing the necessary tools and resources to perform daily jobs:

- “Instead of adding more benefit and pension programs the university needs to support staff members in the workplace with the tools and resources to get our jobs done, improving quality of work life. Now is more important to me than improving my quality of retirement life; the latter I can do on my own. The former is a day to day struggle. Let’s get our priorities straight, the carrot of more retirement income doesn’t address the day to day frustration of having to deliver high quality services with only “two nickels”. If the day to day management doesn’t change soon most of us will leave before retirement any way!!”
3. BENEFITS

One respondent commented on bridge benefits and the negative effect that it has on early retirement plans and the fact that it reduces staff renewal.

4. MANDATORY RETIREMENT

Survey respondents contributed a range of opinions on mandatory retirement. In general, respondents felt that competent and productive staff should be allowed to work after age 65, but that the FEC review process is a “limited tool in measuring who is effective” and it is “public and hurtful”. In addition to the evaluation process, most respondents think that retirement age should be a choice subject to certain criteria; one gave the criteria of a reduced salary, one gave the provision for exceptional cases at contract rates equivalent to part-time sessionals.

A couple of other responses were the following:

- “In today’s climate we need to retain faculty - a university is only as good as its faculty! Many people will retire when they are ready - that is an option I would like to have.”
- “Keep average age at 50. Limit 60+ to 20%.”

5. RETENTION AND RECRUITMENT

Responses regarding retention and recruitment were mixed. One respondent said retaining faculty is important; another comment was that the removal of bridge benefits for early retirement would not promote staff renewal. One respondent supports mandatory retirement because it promotes faculty renewal. One other comment:

- “Early Retirement benefits should be a high priority to encourage staff renewal”.

6. EARLY RETIREMENT

Two respondents indicated that the removal of benefits for early retirement would be a determining factor in their retirement age. Other respondents expressed the desire to retire early without any penalty and with a variety of options.

7. OTHER COMMENTS

- “We need to be competitive with other universities (Top-tier).”
• “Please distribute or post a summary of your results.”
• “I do not entirely agree … that teaching evaluations are an effective method of assessing staff. I think they undermine the teacher/student relationship, converting it into a salesman/customer one.”