

## **Forced Retirement and the “Succession Question” in Canadian Sociology \*** **David MacGregor and Thomas R. Klassen**

Thousands of scholars in English-Canada universities from the pioneering 1960s and 1970s generation imminently face the prospect of forced retirement at an arbitrary age, regardless of their productivity, interests or personal situation. Although it is a serious violation of fundamental human rights, “the simplistic and draconian rule of full retirement at age 65”<sup>1</sup> encounters little opposition from social scientists and specifically from sociologists. This paper looks at the overall dimensions of the age purge in Canadian universities with special emphasis on sociology — a discipline justly proud of its advocacy of social justice. In a coda to this paper, we suggest factors that may avert a human rights disaster in Canadian universities.

### **1. The Age Purge in Canadian Universities**

In 2002/2003 there were 36,050 university teachers in Canada, about 400 fewer than a decade earlier. More than half were over age 50, and about one third were 55 and over.<sup>2</sup> The Association of Universities and Colleges of Canada (AUCC) estimates that 12,000 professors will reach retirement age between 2005 and 2011. “When one combines the growing number of retirements with the likely number of early retirements along with normal attrition at earlier ages, it is likely that more than 20,000 faculty members will retire or leave their university employment by 2011”<sup>3</sup> — almost double the 12,000 departures recorded between 1991 and 2001, when early retirement was popular. On average, for every professor who departed each year in the 1990s, about four will leave the system over the next five or six years.

Quebec does not have mandatory retirement for professors; Manitoba reinstated the practice for professors—University of Manitoba and University of Winnipeg have had forced retirement at 69 since 2001; University of Brandon does not push out older professors. In Saskatchewan, 67 is the mandatory retirement age in some cases. The University of Calgary has no forced exit policy; the University of Toronto abolished the practice in March 2005 for all professors reaching age 65 after July 1, 2005. Excluding the University of Toronto, about 400-450 Ontario professors annually will reach 65 in the next half-decade.<sup>4</sup> At the University of British Columbia alone some 425 faculty will mark their 65th birthday between 2005 and 2011.<sup>5</sup>

Overall, female faculty are younger (average age: 47) than male faculty (average age: 51). In 2001/2002 women age 30-34 made up 8.1 percent of female faculty, while men 30-34 accounted for 5.8 percent of male faculty. About 22 percent of female faculty and 37 percent of male faculty will reach retirement age in the next five or six years. Women faculty will make up over a quarter (26 percent) of those experiencing forced exit between 2006 and 2011. Because women often begin university teaching later in life, mandatory retirement likely comes when their pension accumulations are low; moreover, they “are forced to retire at what could be the peak of their careers.”<sup>6</sup>

More than forty percent of Canadian sociologists (about 330) will reach retirement age between 2006 and 2011. Given that those in higher ranks are likely to be older, about one third of those facing forced retirement will be women (about 110). Many of these, after hard struggles, created a feminist standpoint within Sociology, transforming the discipline.

The age purge that current legislation, administration and faculty association policies make possible, ensures that professors age 65 and older never reach sufficient numbers to effect a radical change in

how elderly people are viewed, treated, and studied in academia. As Donaldson and Emes pointed out,<sup>7</sup> women's participation in higher education needs to reach a critical mass "in the fundamental pillars of academic appointment—research, teaching and service"—before awareness and self-awareness of gender issues in academe is possible. The same is true of age issues—unexamined stereotypes of older people may be common in ivory towers since older people are shut out. Sudden expiration of academic careers at age 65 ensures that older people cannot influence university curricula: "how inclusive is the material, what are the learning dynamics, who controls the research agenda."

## **2. Changing Views of Forced Retirement**

Retirement decisions (and non-decisions) are complex: many factors are involved in this most personal—and decisive—career move. There is no sure way to tell what proportion of Canadian university professors wish to retire upon reaching 65. Some will leave without complaint simply because convention requires it, other will leave earlier than 65 and some will want to remain employed.

Disenchantment with mandated retirement is on the rise. Canadians generally are less willing to retire at 65 than they used to be; this is probably true for university professors as well. Like other professionals, academics stay at work longer than most workers. Recent data show that a large majority of Canadians oppose mandatory retirement—a statistic likely reflecting the opinion of many older professors.<sup>8</sup>

Experience in Manitoba and Quebec shows that without mandatory retirement approximately five percent of full-time professors in Canada would be over 65. Based on United States retirement patterns, Spencer estimates that in Ontario alone 1100 professors would continue to work in the absence of mandatory retirement between 2005 and 2011.<sup>9</sup>

## **3. "The Succession Question"**

In *Society/Societe*, the official newsletter of the Canadian Sociology and Anthropology Association, Bruce Curtis and Lorna Weir opened a debate about "the succession question in Canadian sociology." They pointed to "a wholesale transfer of authority and leadership" as the cohort hired in the 1960s and 1970s withdraws and a new generation takes the wheel.<sup>10</sup>

For Curtis and Weir, older sociologists compare unfavourably to younger peers. "The demographic profile of the discipline and academy has meant that the energy and inventiveness of a generation of scholars in their first decade of post-dissertation work has been but weakly present in our colloquia, meetings and administration for some time now." Observing that stratification of university positions "is largely mapped on the generational divide," the authors describe the "gross indignity" suffered by deserving job candidates repeatedly rejected by "selection committees whose members are less qualified than they are."<sup>11</sup>

Contrary to Curtis and Weir, the dearth of academic positions was hardly the fault of sociology selection committees. Hiring committees probably made the best choices they could under difficult circumstances. Although some job candidates might have better paper qualifications than some members of hiring committees, few prospects likely had had the range of teaching and administrative experience of those doing the hiring.

In contrast with the tone of most of their essay, Curtis and Weir celebrate the "radical chic" of

sociology from the 1960s to the 1980s when it was “‘sexy’; oppositional; boundary-pushing.” It was “‘tied to the social movements” of the period, and “‘linked to the expanding terrain of personal liberation, social governance and social citizenship.” What happened? Sociology grew old and tired, apparently, and requires an infusion of fresh blood. Some departments have already “‘managed generational renewal by hiring entrants with diverse and novel interests, committed to a collegial and re-energized sociology.”<sup>12</sup> According to the AUCC’s managerial perspective, (though it might as well be that of Curtis and Weir) now is the time for “‘revitalizing the universities through faculty renewal,” “‘strategic replacement,” “‘difficult decisions,” “‘growing expectations,” “‘revving up recruitment,” the “‘cream of the crop,” and “‘upping the ante.”<sup>13</sup>

### 3. United States Comparisons

Partly in response to Curtis and Weir, Neil McLaughlin contributed an informed analysis of the differences between university systems in the United States and those in Canada. He showed that structural factors make the Canadian academic scene “‘flat,” while the American system encourages elite achievement. As a result, he argued, Canadian sociology’s scholarly integrity and innovation may be more easily compromised. As in Canada, United States sociology may have low prestige compared to other disciplines, but a sociologist from Harvard is still a Harvard professor.<sup>14</sup> Without elite institutions, Canadian sociology lacks that kind of clout.

Yet McLaughlin misses a key difference between Canada and the United States—one that is shaking up the Canadian post-secondary system from British Columbia to Ontario and the Atlantic provinces. In the United States the compulsory retirement age of university professors was raised from 65 to 70 in 1986; in 1993 forced exit in academia was abolished. As a consequence, the American system allows unhindered intercourse between academic generations. At age 65 an American professor might be contemplating career moves and new vistas of research; in Canada—instead of being offered “‘a performance incentive of further employment opportunities”<sup>15</sup>—the professor is shown the door, and (if lucky) condemned to part-time teaching and a shared office. In the last half-decade of work, the Canadian academic may slow down in despair as the future is closed off—just when United States professors may be catching their second wind.

American universities take advantage of older professors to attract and supervise top graduate students. Many United States institutions have already embarked on a learner-centred approach to teaching that relies on established faculty with more time for students than younger faculty who must concentrate on research and publications. Even without mandatory retirement, there is concern that senior scholars will not stay long enough to avert “‘a near-future shortage of qualified faculty replacements.”<sup>16</sup> While the AUCC (and Curtis and Weir) denigrate the quality of older professors, research in the United States indicates that senior professors are “‘highly productive, hard-working,” and deeply committed to their institutions.<sup>17</sup> A Canadian Federation for the Humanities and Social Sciences report on “‘The Academy as Community” finds an urgent need for mentoring new scholars by experienced professors—but never mentions that, unlike in the United States, mandatory retirement policies will decimate senior professors in the Canadian academic “‘community.”<sup>18</sup>

Younger people are notoriously indifferent to their future as older individuals. But by age 55 most can see where things are headed. Consequently, Canadian universities are finding it difficult to recruit anyone from the United States much older than 50 while American institutions are attracting middle-aged scholars. A 62 year-old Nobel Prize winner vaulted to the United States from the University of British Columbia when he discovered he would be forcibly retired at age 65. One of

the leading thinkers on political thought abandoned Canada for the University of Texas “because he wanted to work beyond 65 . . . Others have left Ontario universities for campuses in Quebec”.<sup>19</sup> The University of Toronto decision in the spring of 2005 to eliminate mandatory retirement is a reflection of its inability to continue to draw high profile scholars with a retirement regime that differed from other Anglo-Saxon nations.

As we have seen, the great purge in Canadian universities will take away 12,000 professors by 2011. However, AUCC estimates (based on projected enrolment growth, research needs and demand for quality teaching) suggest that hiring requirements will be much higher. Replacing the positions lost in the 1990s alone raises this estimate to about 13,000 jobs. Even to restore the student/teacher ratios of the early 1990s, universities would have to hire an additional 10,000 to 20,000 faculty, perhaps more. This could mean doubling the whole system within five or six years.<sup>20</sup>

## 5. Conclusions

Several forces have brought the debate about mandatory retirement to the forefront at the beginning of the 21st century, including the aging baby boom generation, and a greater awareness of human rights. Sociologists have for the most part been silent in this debate that includes ageist preconceptions of older workers, in academia and outside it. As a recent federal report suggests, “stereotypical views may often lead to discriminatory practices that negatively affect older workers in terms of hiring, promotions, job security, access to training and other benefits, and remuneration.”<sup>21</sup> Sociology must go beyond managerial perspectives and offer a progressive model confronting the age purge and re-integrating elderly faculty into the discipline, and more generally other workers who wish to work past an arbitrary retirement age.

Sociologists can rebuke the mythology that resistance to mandatory retirement involves only a few privileged (male) professors brazenly hanging onto high salaries and comfortable jobs. Prominent mandatory retirement legal cases have involved bus drivers, hospitality workers, firefighters, sanitation engineers and police officers.<sup>22</sup> The majority of older workers “would prefer to leave the labour force under terms and conditions of their own choosing rather than being forced to leave.”<sup>23</sup> As with the age purge in the discipline of sociology, women workers are often hurt the most by forced exit.

Sociologists can also undertake research on how ageist attitudes and stereotypes of older workers have come to arise and be taken for granted by many, including some social scientists. Lastly, sociologists can ensure that the debate over mandatory retirement is clear that removing forced retirement to allow those who wish to work longer is not to suggest that workers must work longer. As recent the University of Toronto agreement illustrates, eliminating arbitrary retirement at age 65 can go hand-in-hand with providing all faculty (and more generally, all workers) with greater flexibility as to when to retire.

Governments, such as Ontario and New Brunswick, may soon legislate against mandatory retirement. Alberta, Ontario and British Columbia are pumping up investment in higher education. Without adequate numbers of new PhD graduates to fill the demand, universities (following Toronto’s lead) may turn to their older faculty, abandoning forced exit. This would not only prevent a human rights disaster, it would allow more orderly turnover, with professors leaving gradually rather than all at once at age 65—partially obviating the dysfunctional boom and bust hiring patterns of the 1960s to the 1990s.<sup>24</sup>

**Notes**

- <sup>1</sup> Peter Russell, "Retiree centres – the innovative part of U of T's New Deal," *University Affairs*, May, 2005.
- <sup>2</sup> Deborah Sussman and Lahouaria Yssaad, "The Rising Profile of Women Academics," *Perspectives*, Vol. 6, no. 2, February 2002 *Statistics Canada—Catalogue no. 75-001-XIE*, p. 8, 10.
- <sup>3</sup> *Trends in Higher Education*, Association of Universities and Colleges of Canada, 2002, p. 33.
- <sup>4</sup> Byron G. Spencer, "Student Enrolment and Faculty Recruitment in Ontario: the Double Cohort, the Baby Boom Echo, and the Aging of University Faculty." *Ontario Confederation of University Faculty Associations*, October 2001, Figure 6, p. 22.
- <sup>5</sup> Senate Ad Hoc Committee on the Academic Implications of Mandatory Retirement at Age 65. *University of British Columbia*, May 3, 2002.
- <sup>6</sup> Deborah Sussman and Lahouaria Yssaad, "The Rising Profile of Women Academics," pp.10, 16.
- <sup>7</sup> E. Lisbeth Donaldson, and Claudia Emes. "The challenge for women academics: Reaching a Critical Mass in Research, Teaching, and Service." *The Canadian Journal of Higher Education* 30, no. 3: 33-56, pp. 33, 54.
- <sup>8</sup> HSBC Report: *The Future of Retirement in a World of Rising Life Expectancies*. May 2005. This report found that over 90 percent of respondents in the United States and the United Kingdom opposed mandatory retirement. The numbers for Canada are probably similar.
- <sup>9</sup> Spencer, "Student Enrolment and Faculty Recruitment," Table 1, p. 24.
- <sup>10</sup> Bruce Curtis and Lorna Weir, *The Succession Question in English Canadian Sociology*, *Society/Société*, October 2002, p. 3.
- <sup>11</sup> "The Succession Question," pp. 7, 8.
- <sup>12</sup> "The Succession Question," pp. 10, 12.
- <sup>13</sup> Leanne Elliott, "Revitalizing Universities Through Faculty Renewal," pp. 4, 5, 6, 7.
- <sup>14</sup> "Canada's Impossible Science: Historical and Institutional Origins of the Coming Crisis in Anglo-Canadian Sociology," *Canadian Journal of Sociology*; Winter 2005; 30, 1; pp. 10, 13.
- <sup>15</sup> *University of British Columbia Senate Report on Mandatory Retirement*, p. 6.
- <sup>16</sup> *Late Career Faculty Perceptions: Implications for Retirement Planning and Policymaking*, "Research Dialogue, TIAA-CREF Institute, no. 84, 2005, p. 2.
- <sup>17</sup> "Late Career Perceptions," pp. 4-5.
- <sup>18</sup> Ann Bailey, et. al, "The Academy as Community: A Manual of Best Practices for Meeting the Needs of New Scholars," *Canadian Federation for the Humanities and Social Sciences*, Fall, 2004.
- <sup>19</sup> "Age Rule Costs UBC a Laureate," *Globe and Mail*, October 30, 2004.
- <sup>20</sup> "Trends in Higher Education," p. 22.
- <sup>21</sup> Michel Fourzly and Marc Gervais *Collective Agreements and Older Workers in Canada*, *Labour Program at Human Resources Development Canada* ([http://www.sdc.gc.ca/en/lp/spila/wlb/caowc/10chapter\\_5.shtml](http://www.sdc.gc.ca/en/lp/spila/wlb/caowc/10chapter_5.shtml) -- accessed 24 May 2005).
- <sup>22</sup> David MacGregor, "The Ass and the Grasshopper: Universities and Mandatory Retirement," in C.T. (Terry) Gillin, David MacGregor and Thomas R. Klassen, *Time's Up: Mandatory Retirement in Canada*, Toronto: Lorimer.
- <sup>23</sup> Grant Schellenberg and Cynthia Silver, "You can't always get what you want: Retirement preferences and experiences," *Canadian Social Trends*, Winter 2004, no. 75 (*Statistics Canada—Catalogue No. 11-008*), pp. 2-3.
- <sup>24</sup> See, for example, *Report of the Senate Ad Hoc Committee on the Academic Implications of Mandatory Retirement at Age 65*. *University of British Columbia*, May 3, 2002.

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