

Results of a Survey of the UNC-Chapel Hill Retired Faculty and Professionals Association (RFPA)

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BACKGROUND AND INTRODUCTION

The UNC-Chapel Hill Retired Faculty Association (RFA) was created in 1986. In 2024 the name changed to the Retired Faculty and Professionals Association (RFPA), acknowledging the long-standing inclusion of professional staff.

When leadership of the RFPA transitioned in the summer of 2024, we began to consider how to increase membership in the organization and serve our members in the ways most important to them. Several members of the RFPA conducted systematic reviews of similar institutions' organizations serving retirees. These reviews revealed a range of activities and organizational structures as well as data about the ongoing activities of retirees. In addition, we reviewed results of prior surveys of UNC-Chapel Hill retirees to learn about prior responses and consider question framing.

The earlier surveys conducted in 2005¹ and 2014² examined the views of retired faculty. One hundred eighty-seven retirees responded to the 2005 survey (29% response rate). The majority indicated they wanted the RFA (as it was called then) to “participate in selected University activities [including] “serving on committees and boards.” The 2005 respondents also indicated support for “advocacy with regard to retirement issues,” and a single source for information about retirement. Recommendations to the RFA included: “a) establish a public relations committee to send regular mailings to recruit potential members; b) financial reports to the membership; regular (perhaps monthly) meetings on special interest topics; and c) work with Retired Faculty Benefits Office to address parking for handicapped retirees and basketball tickets.”

In spring 2014 RFA again conducted an online survey, through the Odum Institute, and collected responses from 266 respondents (48% response rate). The survey report² indicated strong support for opportunities to teach and participate in lifelong learning. Retired faculty responded to questions about the most important roles retirees could play at the University and the most frequently chosen was: “mentoring students and/or junior faculty”, endorsed by more than half the respondents. Respondents also indicated desiring services/access to the University libraries and office space and parking. Some expressed the desire to participate in grant-funded activities. Additional questions addressed needs of faculty and responses indicated interest in more information about health care and health insurance.

Having been ten years since the last survey of faculty, 2024 leadership of the RFPA decided a new survey was important to facilitate planning of activities and resources.

METHODS

Study population: Our intent was to include all living retired faculty and professional staff in the EHRA ranks. To create the list to receive the survey instrument, we compiled lists of retirees provided by the UNC-Chapel Hill Human Resources Department as well as membership rolls of RFPA, which includes associate members who are retired from other universities and living in the area. Being aware

¹ Initial Analysis of Responses to survey of UNC-CH Retired Faculty: Emergent Themes and Possible Actions., April 28, 2005.

²Odum Institute. Survey of UNC- Chapel Hill Retired Faculty -Final Report, October 20, 2024.

of the potential for duplicates but not wanting to miss anyone, I removed identical email addresses but left addresses for individuals who may have listed more than one email address. I also removed several individuals on the list whom I knew to be deceased.

Instrument: Using the prior instruments as starting point, I developed a new survey that was reviewed by members of the Executive Committee and tested in both paper and online form after entry into the Qualtrics System for online distribution via email. After developing the survey in August and September, I asked a small group of RFPA members to test the survey and offer suggestions for question improvement first via a Word file and then via Qualtrics to make sure the skip patterns were working properly. That enabled me to make small revisions to question wording and response options and programming within the Qualtrics system.

To characterize the respondents, the survey asked about retiree status (fully retired from UNC, partially retired from UNC, or retired from another institution). Respondents were asked about timing of retirement and their department and title at the time of retirement. The instrument contained both close-ended and open-ended items designed to learn about current activities while others queried participants about interests in activities/services, noting that some are already available and others are under consideration. The instrument asked respondents to indicate reasons to belong to the RFPA and, depending on membership status, respondents answered questions about reasons for joining, leaving, or not joining. In addition, a series of questions sought to understand the extent to which retirees visit the RFPA website and their reactions to both the website and newsletter. The full set of questions appears in the Appendix.

Administration of the survey: In preparation for distribution, I conferred with Celeste Cantrell, Associate Director – Operations, Office of Human Research Ethics from the UNC-Chapel Hill Office of Human Research Ethics, about whether review by the IRB was needed. In an email dated September 23, 2024, she confirmed that no IRB review of the protocol was required.

Qualtrics distributed the survey to 1328 email address on September 25, 2024. On October 10, 2024 Qualtrics sent automated reminder emails to those who either did not respond at all or who had not completed the full instrument. Qualtrics sent a second reminder on October 21, 2024, and a final one on October 28, 2024. I closed the survey on November 15, 2024.

RESULTS

Responses: After the initial emailing of the survey, Qualtrics indicated that 62 were undeliverable. One individual contacted me to report that he is not retired and should not have been on the list. The final numbers of potential respondents have been adjusted to account for the undeliverable messages and the one person who indicated he should not have received the invitation to participate.

By the closing of the survey on November 15, 2024, four hundred ninety-two individuals had responded. This results in a response rate of at least 39% given that there may have been some individuals on the original list with more than one email address. Not every item was answered by each respondent so n's vary throughout, some because of skip patterns and some because of non-response.

Demographics: As shown in Table 1, most of the respondents (88%) indicated they are fully retired from UNC-Chapel Hill and 48 (10%) reported being partially retired (e.g., phased retirement). Twelve Associate Members of RFPA had retired from institutions other than UNC-Chapel Hill. The majority, 173, of respondents had retired before 2021; 117 retired more recently.

Almost half of respondents were not current members of the RFPA and 80 (17%) were unsure of their membership status. The majority of respondents live closer than ten miles from campus and only a small percentage (16%) are residents of a Continuing Care Retirement Community (CCRC).

Fifty-eight percent of the UNC-affiliated respondents reported having a current UNC One Card, while 21% indicated they do not have one; 21% were unsure.

Table 1. Description of the respondents, n=492

Descriptor	n	%
Current Retirement status (Q1) n=483		
Fully retired from UNC	424	88%
Partially retired from UNC	48	10%
Not a UNC retiree (retired from another institution)	12	2%
Retirement Year, Including starting partial retirement (Q7) n=290		
Before 2000	10	3%
2001-2010	32	11%
2011-2020	131	45%
2021 or later	117	40%
Membership status RFPA (as stated by respondent) (Q11) n=484		
Current member	163	35%
Previous member, but not a current member	42	9%
Never been a member	184	39%
Not sure/can't recall	80	17%
Distance of usual home from campus. (Q17) n=443		
Within 5-10 miles of UNC-CH campus	290	66%
Within 11-50 miles of UNC-CH campus	83	19%

Farther than 50 miles from UNC-CH campus	66	15%
Live in a CCCR (Q18) n=398		
Yes	73	16%
No	370	84%
Active UNC One Card among UNC retirees (Q4) n=280		
Yes	161	58%
No	59	21%
Not sure	60	21%

Current Activities of Respondents: Table 2 shows the list of potential activities listed in the questionnaire for which the respondents checked those in which they engaged post-retirement. At the end, respondents could list additional activities after checking “other types of professionals activities.” Those most frequently checked included: publishing scholarly journal articles, chapters or books (45%); conducting research (as PI, collaborator, or consultant) at UNC or elsewhere (40%); and peer reviewing for journals and/or serving on editorial boards (37%). These were followed closely by assorted types of volunteer activities, mentoring of junior faculty, and giving presentations. More than a quarter reported teaching and mentoring students.

Respondents who checked “other types of professional activities” typed in a number of different responses. It includes multiple people serving on Boards and committees for other organizations, providing clinical services in medical, social work, and legal settings, writing and editing books and articles, giving talks to lay audiences, serving on thesis committees and writing letters of recommendation for former students. Several have started new businesses or non-profits or reported doing consulting. One indicated using their talents overseas (e.g., training rescue workers in Lebanon and Syria) while another started a foundation for disabled children and created a film showing the effects of the pandemic on retirees. Several newly retired individuals said they were still figuring out what activities they wanted to engage in while several individuals noted having been very active early in retirement and tapering off engagement over the years.

Table 2. Activities Retirees are Engaged in at Present (Q8), n=424

Activity	n	%
Publishing scholarly journal articles, chapters or books	191	45%
Conducting research (as PI, collaborator, or consultant) at UNC or elsewhere	170	40%
Peer reviewing for journals and/or serving on editorial boards	156	37%
Volunteering in other capacities (e.g., political groups, docent in a museum, literacy program)	144	34%
Mentoring younger faculty or professionals at UNC or elsewhere	122	29%

Giving professional presentations (e.g., at conferences or online)	122	29%
Teaching students in degree granting programs (undergraduate, graduate, professional) or professional training (e.g., health care residents/fellows)	112	26%
Mentoring undergraduate or graduate students at UNC or elsewhere	111	26%
Volunteering related to professional activities (e.g., professional societies)	99	23%
Reviewing faculty for promotion at this or other institutions	72	17%
Teaching/tutoring in other capacities (e.g., HS students, older adults, continuing education, ESL, Literacy)	61	14%
Doing administrative work	51	12%
Creating works of art (e.g., visual arts, theatrical arts, music)	46	11%
Conducting program or institution reviews	27	6%
Performing (e.g., theater, music, dance)	26	6%
Other types of professional activities	99	23%

Reasons that members belong to RFPA: Those individuals who reported being previous or current members of the Association, were asked to rank the most important reasons for being a member, with one being their top reason and ranking through eight possible reasons. Table 3 presents the mean (i.e., average) score for each reason across all respondents. The lower the value the more favorable the average ranking. Wanting to continue involvement with the UNC-Chapel Hill community was the most common reason reported, followed by having friends and peers who are members, and interest in the guest speakers at luncheons. Navigating retirement received ratings indicating that this was a less important reason to join. In the open-ended responses several other reasons for belonging were noted including: meeting new people and making new friends, connecting RFPA with other similar organizations; and advocating for the university and for retired faculty. Several expressed a desire for a more diverse membership.

Table 3. Most Important Reasons for being an RFPA Member, among those who are current or were previous members (Q12), n=175

Reasons	Average ranking (from 1= high to 8=low)
I want to continue my involvement within the UNC-CH community.	2.7
I have friends and peers who are also members	3.1
I am interested in the guest speakers that the RFPA luncheons feature.	3.3
I want to keep engaging with ideas and learning	3.9
I like learning about opportunities and resources for retirees through the RFPA.	4.4
I want to expand my network within the retired UNC-CH faculty and staff community.	4.5
The RFPA is helping me navigate my retirement.	6.4

Current members also responded to questions about the factors that limit their participation in the organization. As shown in Table 4, their most often cited reasons include “being too busy” and “not knowing others in the organization.” More than a third noted that they didn’t really know how to engage. Others were not interested, had family responsibilities, lived far away, or had difficulty or concerns about attending in-person events.

Table 4. RFPA Members’ reports of factors limiting participation in the RFPA (n=137)

Reasons	Somewhat or a major limiting factor	
	n	%
I am too busy (n=132)	80	61%
I don’t know others who participate (n=132)	53	40%
I am not really aware of ways to engage (n=131)	48	37%
I am not interested (n=132)	45	34%
Concerns about infection (e.g., COVID) (n=133)	44	33%
Family responsibilities (n=131)	43	33%
Difficult for me to attend in-person events (n=137)	43	32%
Other groups offer similar benefits (n=131)	33	25%

Distance from campus (n=140)	31	22%
I can't easily get to the Friday Center (n=135)	22	16%
Cost is not worth it (n=130)	15	12%

Reasons for not joining or dropping out of RFPA: Respondents who indicated they have never been members of the RFPA responded to questions about their reasons for not joining. As shown in Table 5, among that group eighty-three indicated they were not clear about the benefits of joining – the leading reason non-members haven't joined. Fifty-two indicated they just hadn't gotten around to joining and a similar number responded that they were too busy with other activities. Some said they lived too far away, and others were not aware of the existence of the organization.

Table 5. Reasons individuals have never joined RFPA (Q28), n=186

Reasons for not joining	n	%
I have not been clear about the benefits of joining	83	45%
I didn't get around to joining	52	28%
I am too busy with other activities	51	27%
I live too far away	35	19%
I don't know anyone else who belongs	33	18%
I didn't know that RFPA existed	24	13%
It is difficult for me to attend in-person events	21	11%
I live in a CCRC and have many of the same types of activities	13	7%
I have concerns about infection (e.g., COVID)	7	4%
Meetings are at an inconvenient time for me	5	3%

Table 6 displays the reasons the responses thirty-three previous members checked in response to the question “Why did you discontinue your membership in the UNC-CH Retired Faculty and Professionals Association (RFPA)? Check those statements that apply to you.” The reason checked by the most was “I am too busy with other activities” though some indicated they just hadn’t gotten around to paying their dues. The distribution of reasons is shown in Table 6 in descending order of frequency. One person jotted a note saying that the time of meetings was inconvenient.

Table 6. Reasons for discontinuing membership in RFPA (Q29), n=33 former members

Reasons former members have discontinued membership	n	%
I am too busy with other activities	10	30%
I didn't get around to paying dues	9	27%
I didn't find it useful or enjoyable	7	21%
Don't know others who belong	7	21%
Concerns about COVID exposure	7	21%
I moved too far away	6	18%
I have trouble getting to events	6	18%
My health creates barriers to participating	4	12%
I live in a community (e.g., CCRC, 55+ community that has all the activities I need	4	12%
I have family responsibilities	2	6%
I am no longer interested in affiliation with UNC-CH	0	0%

Other reasons	1	3%
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Interest in potential opportunities and activities of the organization: To help guide future programming of the Association, a question stated, “Some of the following opportunities are already available to at least some retired faculty and/or professional staff, and some are ideas about future programming. If the following were offered or made easier to access as a member of the RFPA, how likely would you be to participate?” Table 7, listed in order of positive response, demonstrates that there is high interest in a number of activities and opportunities.

Table 7. Indication of likely participation in select activities and opportunities if offered (Q13), n=393

Opportunities	n	%
Obtain access to all UNC-CH library resources and information systems (i.e., collections and journals, including online) (n=393)	331	84%
Have access to IT services for routine computer support (n=393)	323	82%
Be eligible for discounts for computer purchases through UNC-CH bookstore (n=383)	270	71%
Learn new technologies (n=366)	220	60%
Meet other people who share my academic interests & experience (n=365)	193	53%
Receive retiree rates to UNC-CH recreational facilities (e.g., Fetzer gym, FARM, golf course, pools, Wellness Center) (n=384)	198	52%
Attend courses (live or virtual) just for retirees (n=384)	199	52%
Attend monthly RFPA lunches with guest speakers (n=386)	184	48%
Learn how to access University news (e.g., Well, Daily Tar Heel) (n=364)	171	47%
Learn about UNC retirement process and benefits (e.g., emeritus status, parking, insurance, unused sick/vacation days, etc.) (n=371)	139	38%
Audit courses at UNC-CH (n=380)	146	38%
Learn about opportunities to be a study subject (e.g., medical, public health, social science, opinion polls) focused on retiree age group (n=368)	135	37%
Meet with and/or mentor UNC-CH students (n=371)	125	34%
Join organized outings (e.g., museums, concerts, lectures) (n=379)	121	32%
Participate on a committee within the RFPA organization that fits my skills and interests (n=360)	105	29%
Mentor junior faculty (n=360)	104	29%
Participate in a book group (n=364)	102	28%
Participate in a speakers' bureau for area community groups (e.g., colleges, K-12, senior centers, CCRCs) (n=373)	87	23%
Teach a course in your subject area for other seniors (e.g., through Shared Learning) (n=358)	77	22%

Engage in artistic endeavors with other retirees (n=360)	60	17%
Engage in sports endeavors with other retirees (n=354)	55	16%
Have access to shared office space on campus (n=351)	52	15%
Seek competitive small grants to support work/travel related to your continuing scholarly pursuits (n=352)	50	14%
Serve as a local host for international students or post-docs (n=359)	44	12%
Participate in a writing group (n=356)	40	11%

An open-ended question invited other suggestions in response to “Please list any additional activities, information, or services you would like for the RFPA to consider undertaking, making available, or helping you access.” Multiple people requested easier and less expensive parking options for campus events (e.g., performances and sports events). Others requested retiree discounts for performances and other events. There were also suggestions of additional topics to be covered at luncheons or through Zoom sessions. These included unbiased information on health insurance options for retirees, estate planning, investing, and taxes. One respondent suggested creating an “academy of retired scholars” similar to other institutions while another requested a role in organizing cheaper travel options. A number of individuals requested virtual access to lunch speakers noting either difficulty in getting to the events because of mobility issues or because they live out of state (or out of the country).

Several individuals urged that the organization be involved in advocacy for the University. One wrote, “my major concern is I do not want the RFPA to be an old folks home where people only discuss their ailments. The RFPA should be a mission-driven organization to promote the mission of public education (at all levels) at a time when the dark forces of ignorance are trying to undermine it. It means Education has to have its act together and what we do must be effective and ethical. RFPA can be a major actor in this oversight.” Another argued, “We should align ourselves more closely with the GAA , now the UNCCH Alumni Association. We should stay away from heavy focus on campus issues and increase our engagement with other UNC System retirees and major private institutions, We should assess larger policy issues, e.g. Impact of UNC Health System on UNCCH academic mission, Impact of the Athletic Program on the academic programs, trustee and BOG intrusions, etc.”

At the end of the survey, participants were invited to offer any final comments for the organization. Many jotted their thoughts. These included asking for: a broader range of topics for the luncheons, with several specific topics being suggested (e.g., non-biased information about health insurance options, current social issues); creation of a membership directory; creation opportunities for out-of-state retirees and providing virtual access to presentations; and encouraging unit heads to utilize the expertise of retirees through roundtable discussions.

Several respondents addressed their frustrations with the University and lack of guidance about the retirement process through the HR system, lack of appropriate recognition for many years of service, and outrage at the change in email access that was recently implemented. One of those who objected to the change in email access stated “The number one reason I am filling out this survey is the

absurd implementation of the new email policy for retirees by UNC. The people implementing it don't seem to have a clear understanding of how many faculty remain active scholars after they retire, and that forcing them to use a clunky webmail interface, full of warnings for every bit of external mail (including every non-UNC.edu address) is quite alienating. Perhaps that is the real goal, or simply to shed ex-employees without concern for the fact that they might remain assets to the institution and potential donors. But if not, I would hope that the RFPA would make an official complaint to the Chancellor, and that someone might listen.”

The responses differed only slightly when stratified by whether the respondent was a current RFPA member or had never been a member, as shown in the Figures 1 and 2 below, showing percentage responses for 150 current members and 167 respondents who had never been a member.

However, greater differences appear in the stratification by year of retirement, as shown in Figures 3 and 4. For example, those who retired earlier show proportionally more interest in book and writing groups and learning about participating in research studies than those who retired later. At the same time, fewer who retired earlier expressed interest in mentoring faculty or participating in a speakers' bureau. None in the gro

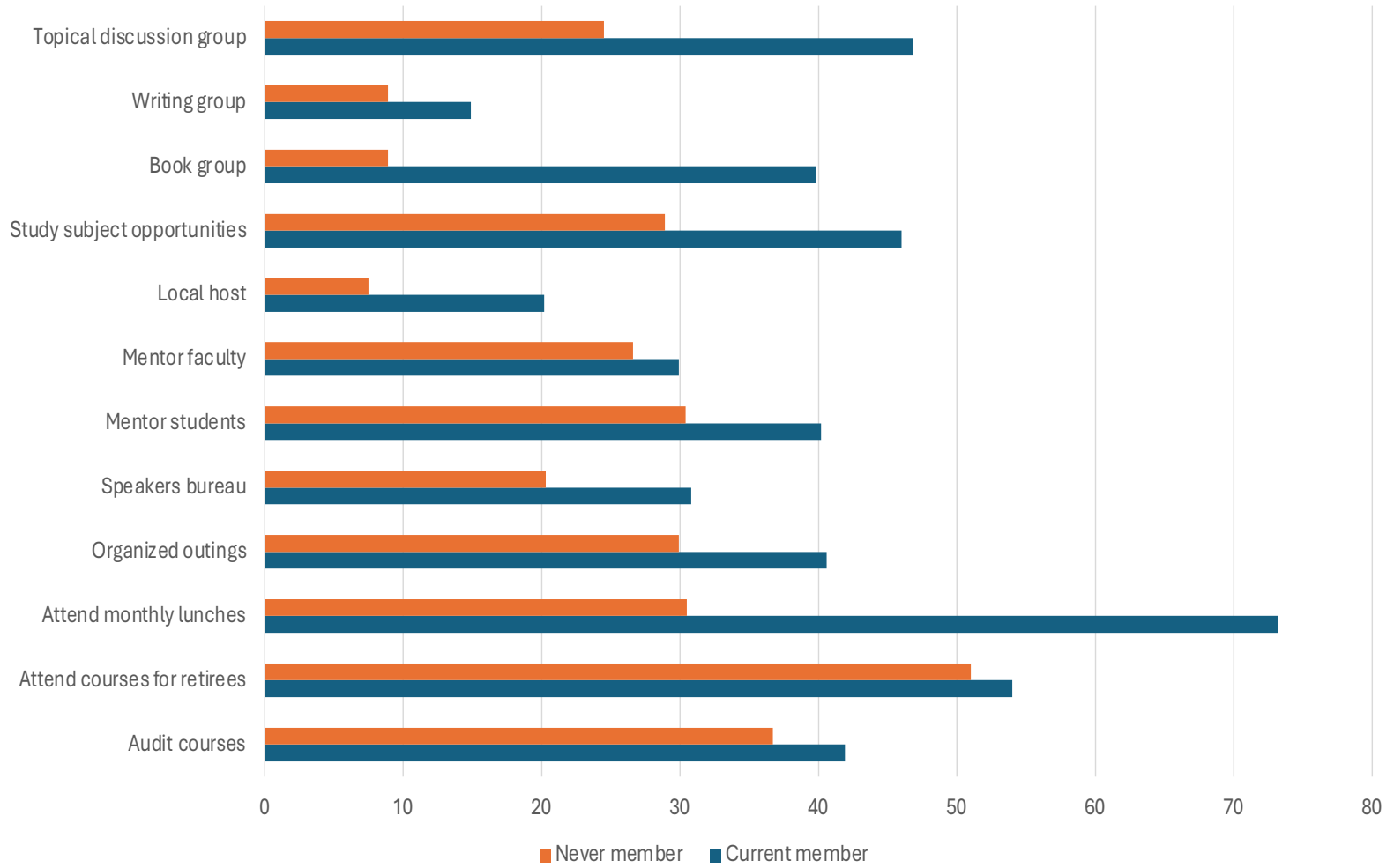


Figure 1. Interest in selected activities by membership status in RFPA

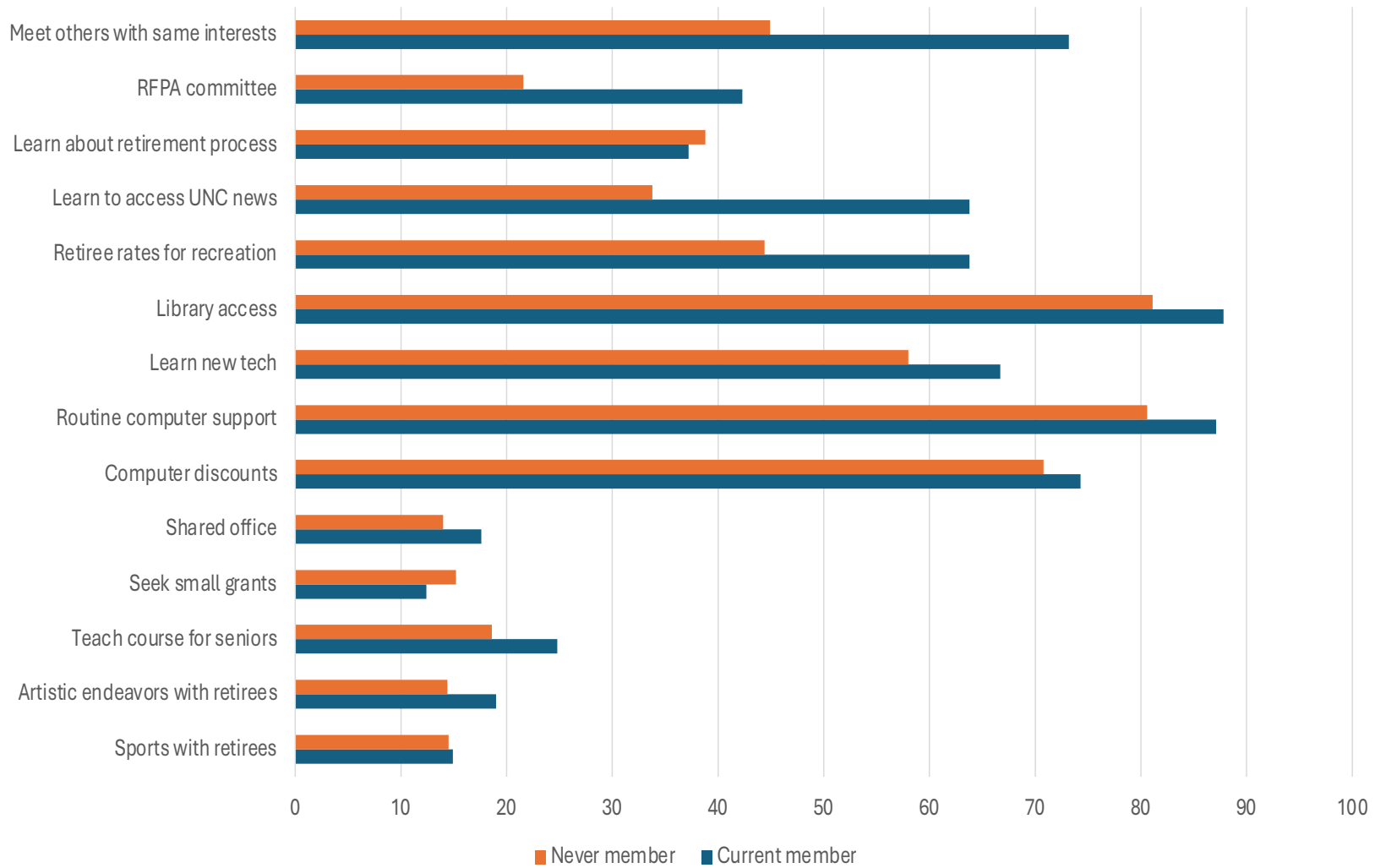


Figure 2. Interest in selected activities by membership status in RFPA

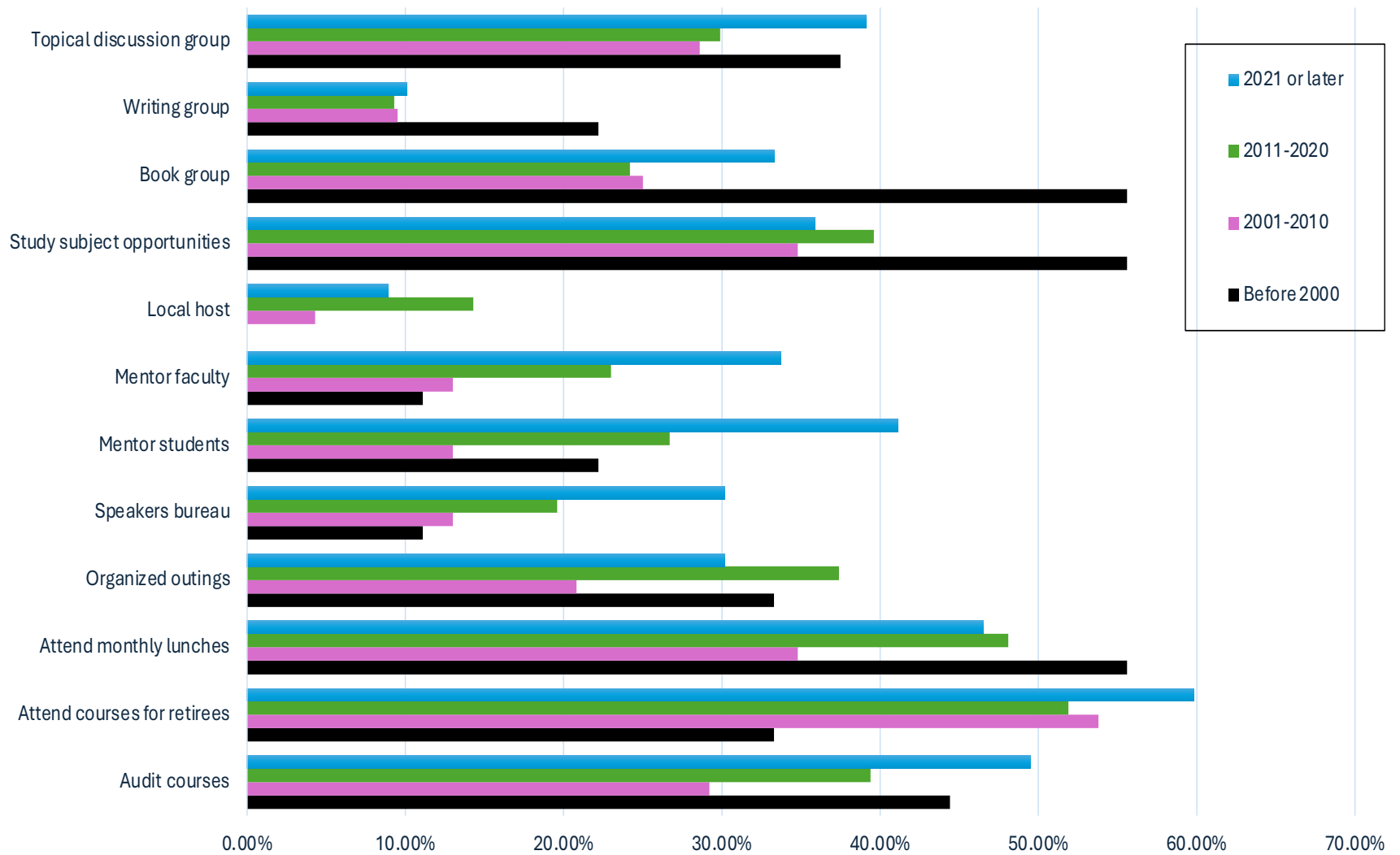


Figure 3. Interest in selected activities by year of retirement

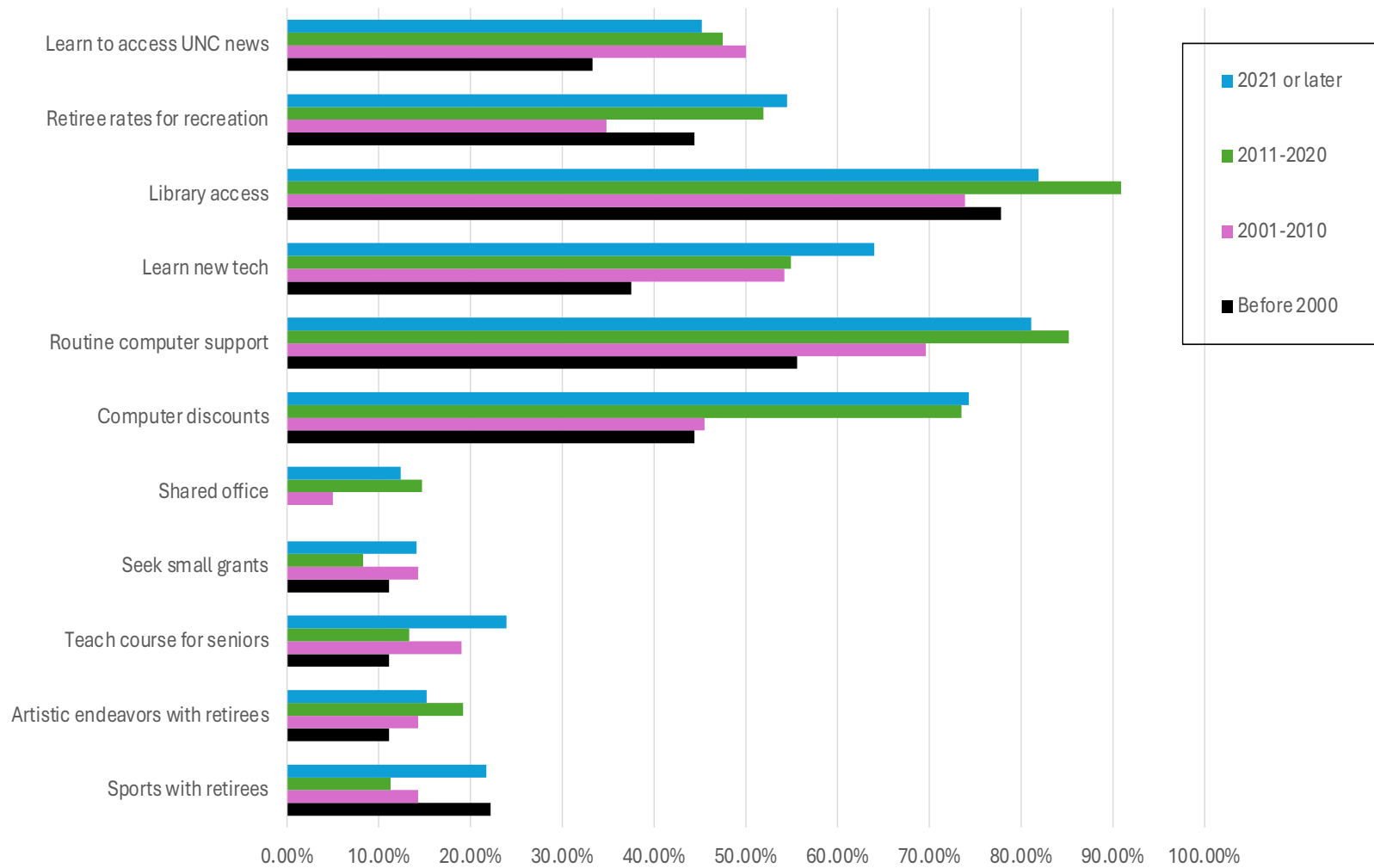


Figure 4. Interest in selected activities by year of retirement

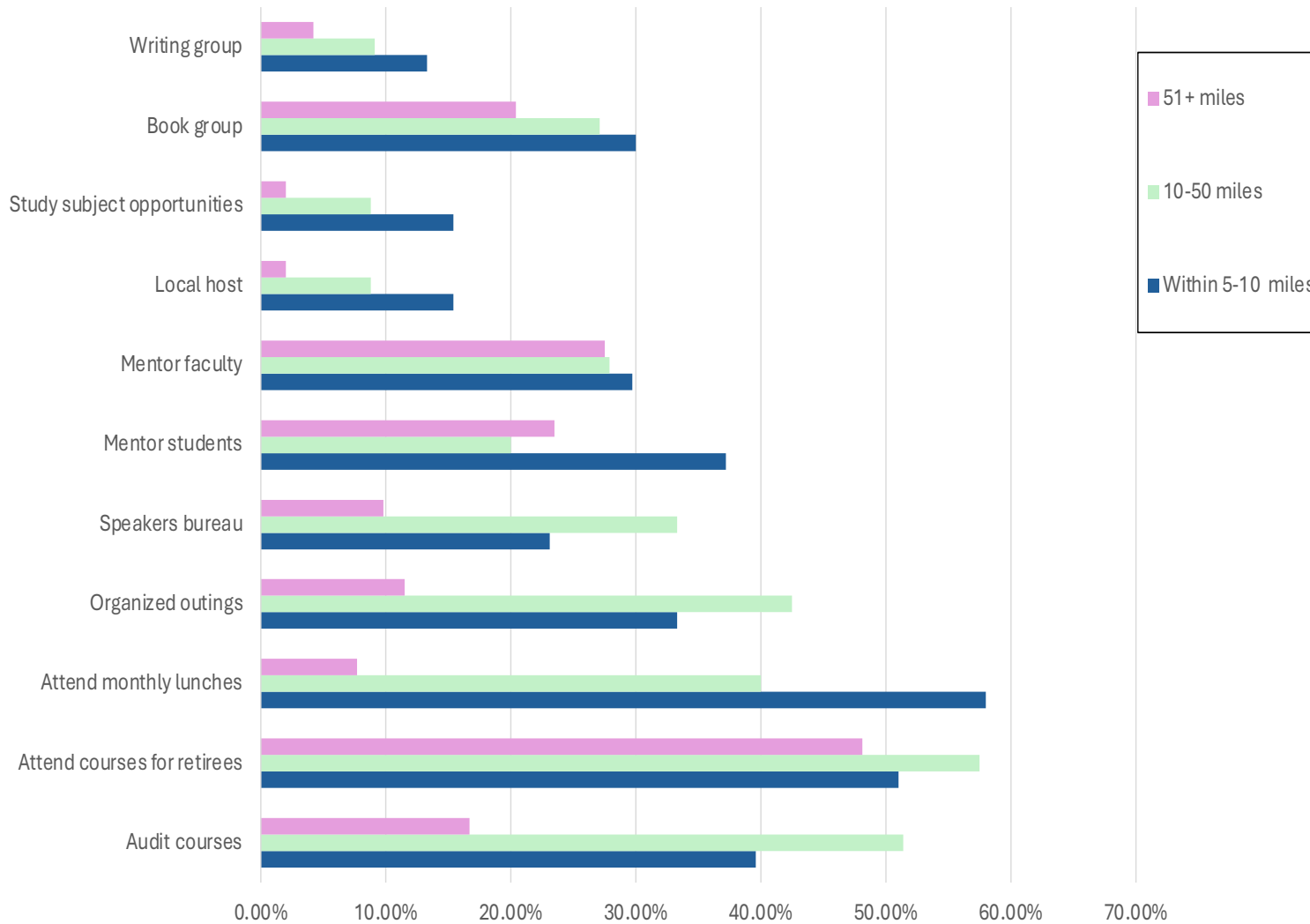


Figure 5. Interest in selected activities distance from campus

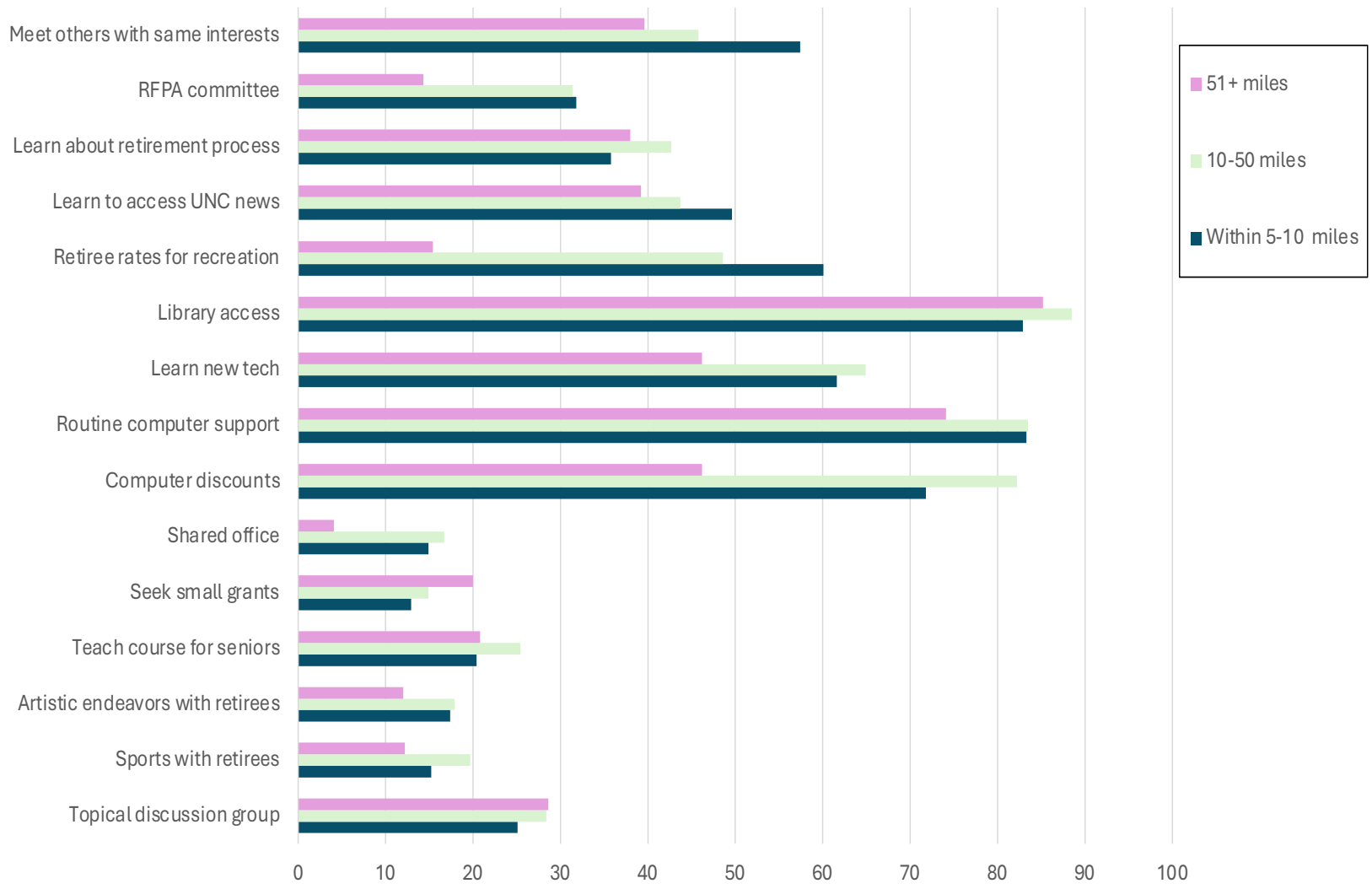


Figure 6. Interest in selected activities distance from campus

Assessment of the RFPA website: The majority (78%) of survey respondents indicated they almost never visit the website while only 5% visit the website at least monthly (Table 8).

Table 9 shows responses to an item that read, “As we update and improve the RFPA website, please tell us how much each of these existing or potential elements of the website would be useful for you.” Response options for each element were “very useful,” “somewhat useful,” or “not useful.”

Table 8. Visiting the Website, n=440

Frequency of visiting the RFPA website (Q20)	n	%
Weekly or monthly	20	5%
Annually or several times a year	78	18%
Almost never	342	78%

Table 9. Usefulness of potential elements of the RFPA website (Q21), n=386

Elements	Very useful		Somewhat useful		Not useful	
	n	%	n	%	n	%
Benefits available to UNC-CH retirees (n=383)	234	61%	115	30%	34	9%
Notices of upcoming RFPA events/opportunities (n=386)	168	44%	157	41%	61	16%
Links to campus calendar of events (n=373)	133	36%	156	42%	84	23%
Directory of RFPA members (n=383)	132	35%	188	49%	63	16%
Links to campus newsletters (e.g., The Well (formerly the Gazette), Daily Tar Heel) (n=356)	112	31%	150	41%	104	28%
Updates from RFPA faculty council representatives (n=365)	80	22%	185	51%	100	27%
Ways to keep learning (e.g., lectures, courses) (n=369)	76	21%	147	40%	146	40%
Ways to get more involved & contribute to the campus or community (n=366)	72	20%	176	48%	118	32%
Strategies for navigating the retirement process (n=365)	67	18%	102	28%	196	54%
Benefits available to UNC-CH RFPA members who retired from other institutions (n=354)	36	10%	41	12%	277	78%
RFPA awards (n=364)	36	10%	134	37%	194	53%

In response to a question about ways the newsletter might be improved, respondents made a few suggestions. Two individuals stressed the importance of updating the content more often, and another urged that it be made easier to navigate while someone else suggested making it less text heavy.

Assessment of newsletter: Readership of the newsletter was asked only of RFPA members. The results are shown in Table 10. Most (74%) of the respondents indicated reading at least some of the newsletter all of the time while 15% never read the newsletter and 10% did not recall having gotten the newsletter.

Table 10. Newsletter reading and opinions by members of RFPA (Q15), n=154

How often do members read the RFPA newsletter?	n	%
Whole newsletter, every time	55	36%
Parts of newsletter, every time	59	38%
Some or all of newsletter, some of time	23	15%
Never read any	1	1%
Don't recall getting the newsletter	16	10%

Open-ended responses to the question “How else could the newsletter be improved” included suggestions to add more pictures, expand the scope of the content, publish it more frequently, provide a list of upcoming events, include opportunities in the wider community, and make the format easier to navigate. Several noted that they like it the way it is while one respondent said “Maybe by making the RFPA more mission driven, the newsletter will be a more important vehicle.”

The questionnaire also asked respondents to indicate their most preferred ways of obtaining information and other ways that were acceptable but not preferred as well as to note methods they don't use at all. As shown in Table 11, receiving information through the emailed newsletter had the most favorable rating, with 307 rating it as “most preferred” and 53 as “OK, but not preferred”. Receiving other information via email was also considered suitable, with 284 respondents indicating it was either most preferred or at least OK. The majority of respondents do not use social media or text messages for receiving information.

Table 11. Preferred way of getting information (Q23), n=358

Mode of communication	Most Preferred		OK, not preferred		Don't use	
	n	%	n	%	n	%
Emailed newsletter	307	79%	53	14%	31	8%
Emails for each type of service/event	153	42%	131	36%	81	22%
Information posted on website	100	27%	126	34%	142	39%
Social media	10	3%	93	26%	257	72%
Text messages	33	9%	178	50%	147	41%

DISCUSSION

Summary: The survey documents that the retired faculty and staff who responded are very active both professionally and in volunteer activities outside their professions. This is consistent with the finding that a major reason for not joining the organization is being too busy. However, when asked about potential to participate in varied types of activities or opportunities, there was high interest among both members and nonmembers, suggesting that carefully curating the offerings may attract members at different points in the retirement.

Attractiveness of joining may be a function, in part, of how the benefits of being part of the association are configured and described. It is noteworthy that nearly half (45%) of non-members indicated they were unsure of the benefits to belonging. The fact that few respondents visit the website regularly signals a need to both drive traffic to the website and ensure that the material contained there is easy to access and informative. The kinds of material that respondents thought

would be useful on the website varied considerably and needs careful consideration as RFPA reaches out to distinct audiences.

Clearly, sending information by email is a preferred method of communication over use of social media or text messaging and relying on the website is of modest favorability at this time. Clearly, messaging being pushed out to members was preferred over expecting members to go to a website.

The newsletter is read regularly by most members and appears to be a strong means of communication at the present time. It potentially can be a vehicle for driving people to the website for more in-depth information.

Limitations: Though this survey contains a wealth of information about the views of those who participated, there are potential limitations. We cannot be certain we have a full list of living retirees and we suspect there were some individuals contacted through multiple email accounts and there may have been names of deceased individuals on the list. Plus, we know some of addresses were incorrect as more than sixty could not be delivered. Consequently, computing a firm response rate is impossible. Also, because of uncertainty about the scope of the original lists of retirees we cannot be sure how well respondents represent the view of the larger groups of retired faculty and retired professional staff. However, it is likely that any bias in responding is toward those most interested in retiree affairs and, therefore, most likely to join or participate in RFPA activities.

Implications and future directions: Despite the fact that respondents report being very busy, they indicate wide interests in the potential types of activities and opportunities that could be organized through the RFPA. Some of the listed activities and opportunities are already available, but some retirees may not be aware of the resources or how to access them. If there are differences in availability of opportunities for senior professionals vs. faculty, this needs to be clarified, with information about how to access the available resources clearly indicated on the website and noted in the newsletter. All retirees should be alerted to the availability of this information on the website, not only those receiving the newsletter as members.

As we develop our menu of activities and opportunities, we need to consider those that appeal to different subgroups including those retired for different lengths of time and in varied locations. Older retirees and those in more remote locations appear eager to participate virtually in multiple types of activities. Initiating some selected options (e.g., some webinars or online discussion groups) could enable testing the feasibility and desirability of this approach. In addition, for retirees who are less able to attend in-person meetings but who want to engage with others, we might initiate a mechanism on the website to facilitate those with similar interests connecting with each other. A directory with contact information and interests may be a way to begin.

Using the results of the survey, the Executive Committee can develop a staged approach to both publicizing current resources and activities and developing new offerings, working with the University administration to gain assistance. Working closely with the Provost's office will also enable swifter transfer of information about changes that may affect retirees (e.g., recent changes in how emeritus status is obtained and changes in access to One Cards).

Developing some of the potential activities that were of interest to respondents will require more resources than currently available to the Association. But, with resources to enable more options,

increased participation is likely. To facilitate engagement, it will be important to maintain and regularly update a mailing list of retirees.

As we develop a good list of retirees, we need to develop new methods of reaching out to be sure all know about the existence of RFPA and are encouraged to join and contribute to the organization. Developing a brochure that can be disseminated at the time of retirement and printable from the website is one way to accomplish greater visibility. To encourage membership we could consider a free membership for 6-12 months after retirement as a trial period.

Also, publicizing the organization in various venues on campus (e.g., Daily Tar Heel and The Well) as well as off-campus (e.g., CCRC newsletters) might help attract new members who are retired from UNC as well as those eligible to be associate members. Requesting coverage of the activities and awards of retirees could enhance the profile of the role retirees play in the University and broader community and, at the same time, encourage membership in the RFPA.

Developing online opportunities to participate for retirees who either live outside of the Chapel Hill area or who are less mobile is an area to explore. This could be coupled with expanding opportunities through the Shared Learning program.

As we approach the 40th anniversary of the organization there are multiple ways to enhance the visibility of the organization and the important role that retirees continue to play in their fields and in new endeavors.

As we try new approaches, we should conduct periodic assessments of both engagement and satisfaction with the activities and suggestions of improvements. And, this survey should be repeated within five to ten years as part of our continuing quality improvement process.

APPENDIX –SURVEY INSTRUMENT

RFPA 2024 SURVEY QUESTIONS

Q1 Which of these categories best describes your CURRENT status. Are you retired (fully or partially) from UNC-CH?

- Yes, fully retired from UNC-CH (i.e., not working at all for pay from UNC-CH) (1)
- Yes, partially (i.e., working at UNC-CH for pay part-time. For example, phased retirement) (2)
- No, I am retired from another institution, did not work for UNC-CH (3)

Skip To: Q5 If Current retirement status = No, I am retired from another institution, did not work for UNC-CH

Q2 What was your PRIMARY unit (e.g., Department, Institute, Center) of appointment at UNC-CH AT THE TIME YOU RETIRED?

Q3 What was the last title(s) you held WHEN YOU RETIRED from UNC-CH?

Q4 Do you have an active UNC One Card?

- Yes (1)
- No (2)
- Not sure (3)

Display This Question:

If Current retirement status = No, I am retired from another institution, did not work for UNC-CH

Q5 What institution and department/unit were you affiliated with AT THE TIME YOU RETIRED?

Display This Question:

If Current retirement status = No, I am retired from another institution, did not work for UNC-CH

Q6 What was your TITLE at the institution from which you retired (e.g., Professor, Director, Head Librarian)?

Q7 In which time period did you retire from the MOST RECENT ACADEMIC INSTITUTION FROM WHICH YOU RETIRED. Include starting phased retirement)?

- Before 2000
- 2001-2010
- 2011-2020
- 2021 or later

Q8 SINCE RETIREMENT (including starting phased retirement) to what extent have you remained active in any of these ways? Check all that apply.

- a. Teaching students in degree granting programs (undergraduate, graduate, professional) or professional training (e.g., health care residents/fellows)
- b. Teaching/tutoring in other capacities (e.g., HS students, older adults, continuing education, ESL, Literacy)
- c. Conducting research (as PI, collaborator, or consultant) at UNC or elsewhere
- d. Doing administrative work
- e. Mentoring younger faculty or professionals at UNC or elsewhere
- f. Mentoring undergraduate or graduate students at UNC or elsewhere
- g. Creating works of art (e.g., visual arts, theatrical arts, music)
- h. Performing (e.g., theater, music, dance)
- i. Reviewing faculty for promotion at this or other institutions
- j. Conducting program or institution reviews

- k. Peer reviewing for journals and/or serving on editorial boards
 - l. Publishing scholarly journal articles, chapters or books
 - m. Volunteering related to professional activities (e.g., professional societies)
 - n. Volunteering in other capacities (e.g., political groups, docent in a museum, literacy program)
 - o. Giving professional presentations (e.g., at conferences or online)
 - Other types of professional activities (please specify)
-

Q11 Which best describes your membership status in the UNC-CH Retired Faculty and Professionals Association (UNC-CH RFPA)? [check the one best answer]

- Current member
- Previous member but not a current member
- Never been a member
- Not sure / can't recall

Display This Question:

If MEMBERSHIP = Current member

Or MEMBERSHIP = Previous member but not a current member

Q12 What are the most important reasons you have been a member of the RFPA? Rank order the reasons with "1" being the most important reason. MOVE EACH LINE INTO THE PROPER POSITION WITH YOUR CURSOR. Please tell us any other reasons under "other:"

- _____ • I have friends and peers who are also members
 - _____ • I am interested in the guest speakers that the RFPA luncheons feature.
 - _____ • I want to continue my involvement within the UNC-CH community.
 - _____ • I want to expand my network within the retired UNC-CH faculty and staff community.
 - _____ • I like learning about opportunities and resources for retirees through the RFPA.
 - _____ • The RFPA is helping me navigate my retirement.
 - _____ • I want to keep engaging with ideas and learning
 - _____ Other (8)
-

Display This Question:

If MEMBERSHIP = Previous member but not a current member

Q29 Why did you discontinue your membership in the UNC-CH Retired Faculty and Professionals Association (RFPA)? Check those statements that apply to you.

- I didn't get around to paying dues; did not intend to discontinue
- I have family responsibilities
- I didn't find it useful or enjoyable
- I am no longer interested in affiliation with UNC-CH
- I moved too far away
- I am too busy with other activities
- I live in a community (e.g., CCRC, 55+ community) that has all the activities I need)
- Don't know others who belong
- I have trouble getting to the events
- Concerns about COVID exposure
- My health creates barriers to participating
- Other reasons _____

Display This Question:

If MEMBERSHIP = Never been a member

Q28 Which, if any, of these are your reasons for not currently belonging to the UNC Retired Faculty and Professionals Association (RFPA)? Check all that apply.

- I didn't know that RFPA existed
 - I have not been clear about the benefits of joining
 - I didn't get around to joining
 - I'm just not interested
 - Meetings are at an inconvenient time for me
 - I live too far away
 - I don't know anyone else who belongs
 - I am too busy with other activities
 - I live in a CCRC and have many of the same types of activities
 - It is difficult for me to attend in-person events
 - I have concerns about infection (e.g., COVID)
-

Q13 Some of the following opportunities are already available to at least some retired faculty and/or professional staff, and some are ideas about future programming. If the following were offered or made easier to access as a member of the RFPA, how likely would you be to participate?

	Probably would participate (1)	Probably would NOT participate (2)
Audit courses at UNC-CH (1)	<input type="radio"/>	<input type="radio"/>
Attend courses (live or virtual) just for retirees (2)	<input type="radio"/>	<input type="radio"/>
Attend monthly RFPA lunches with guest speakers (3)	<input type="radio"/>	<input type="radio"/>
Join organized outings (e.g., museums, concerts, lectures) (4)	<input type="radio"/>	<input type="radio"/>
Participate in a speakers' bureau for area community groups (e.g., colleges, K-12, senior centers, CCRCs) (5)	<input type="radio"/>	<input type="radio"/>
Meet with and/or mentor UNC-CH students (6)	<input type="radio"/>	<input type="radio"/>
Mentor junior faculty (7)	<input type="radio"/>	<input type="radio"/>
Serve as a local host for international students or post-docs (8)	<input type="radio"/>	<input type="radio"/>
Learn about opportunities to be a study subject (e.g., medical, public health, social science, opinion polls) focused on retiree age group (9)	<input type="radio"/>	<input type="radio"/>
Participate in a book group (10)	<input type="radio"/>	<input type="radio"/>
Participate in a writing group (11)	<input type="radio"/>	<input type="radio"/>
Participate in topical discussion group (12)	<input type="radio"/>	<input type="radio"/>
Engage in sports endeavors with other retirees (13)	<input type="radio"/>	<input type="radio"/>

Engage in artistic endeavors with other retirees (14)	<input type="radio"/>	<input type="radio"/>
Teach a course in your subject area for other seniors (e.g., through Shared Learning) (15)	<input type="radio"/>	<input type="radio"/>
Seek competitive small grants to support work/travel related to your continuing scholarly pursuits (16)	<input type="radio"/>	<input type="radio"/>
Have access to shared office space on campus (17)	<input type="radio"/>	<input type="radio"/>
Be eligible for discounts for computer purchases through UNC-CH bookstore (18)	<input type="radio"/>	<input type="radio"/>
Have access to IT services for routine computer support (19)	<input type="radio"/>	<input type="radio"/>
Learn new technologies (20)	<input type="radio"/>	<input type="radio"/>
Obtain access to all UNC-CH library resources and information systems (i.e., collections and journals, including online) (21)	<input type="radio"/>	<input type="radio"/>
Receive retiree rates to UNC-CH recreational facilities (e.g., Fetzer gym, FARM, golf course, pools, Wellness Center) (22)	<input type="radio"/>	<input type="radio"/>
Learn how to access University news (e.g., Well, Daily Tar Heel) (23)	<input type="radio"/>	<input type="radio"/>
Learn about UNC retirement process and benefits (e.g., emeritus status, parking, insurance, unused sick/vacation days, etc.) (24)	<input type="radio"/>	<input type="radio"/>
Participate on a committee within the RFPA organization that fits my skills and interests (25)	<input type="radio"/>	<input type="radio"/>

Meet other people who share
my academic interests &
experience (26)



Q14 Please list any additional activities, information, or services you would like for the RFPA to consider undertaking, making available, or helping you access?

Display This Question:

If MEMBERSHIP = Current member

Q15 How much do you read the RFPA newsletter that is emailed to you? Check the best answer to describe your reading.

- I read the whole newsletter every time it comes (1)
- I read parts of the newsletter every time it comes (2)
- I read some or all of the newsletter some of the time (3)
- I never read any of the newsletters (4)
- I don't recall getting a newsletter (5)

Display This Question:

If MEMBERSHIP = Current member

Q16 How could the RFPA newsletter be improved?

Q17 Where do you live most of the time?

- Within 5-10 miles of UNC-CH campus (1)
- Within 11-50 miles of UNC-CH campus (2)
- Farther than 50 miles from UNC-CH campus (3)

Q18 Do you currently live in a Continuing Care Retirement Community (CCRC)?

- Yes (1)
- No (2)

Display This Question:

If CCRC = Yes

Q19 Which CCRC?

Q20 How often do you visit the RFPA website: (<https://uncrfpa.web.unc.edu>)? Pick the one best answer.

- At least weekly
- Monthly
- Several times a year
- Annually
- Almost never

Q21 As we update and improve the RFPA website, please tell us how much each of these existing or potential elements of the website would be useful for you.

	VERY USEFUL (1)	SOMEWHAT USEFUL (2)	NOT USEFUL (3)
notices of upcoming RFPA events/opportunities (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
directory of RFPA members (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RFPA awards (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ways to get more involved & contribute to the campus or community (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
strategies for navigating the retirement process (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ways to keep learning (e.g., lectures, courses) (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
benefits available to UNC-CH retirees (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
benefits available to UNC-CH RFPA members who retired from other institutions (8)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
links to campus calendar of events (9)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
links to campus newsletters (e.g., The Well (formerly the Gazette), Daily Tar Heel) (10)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
updates from RFPA faculty council representatives (11)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Display This Question:

If VISIT WEB = At least weekly

Or VISIT WEB = Monthly

Or VISIT WEB = Several times a year

Or VISIT WEB = Annually

Q22 Please give us your suggestions on how could the website be improved.

Q23 Please tell us how you would prefer to learn about events, services, and activities of the RFPA?

	MOST PREFERRED (1)	OK, BUT NOT PREFERRED (2)	DON'T USE (3)
Emailed newsletter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emails for each type of service or event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information posted on the RFPA website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social media (e.g., Facebook, Linked In)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Text messages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Display This Question:

If MEMBERSHIP = Current member

Q27 To what extent, if at all, do these factors limit your participation in UNC-CH Retired Faculty and Professionals Association (RFPA) activities?

	Major limiting factor (1)	Somewhat of a factor (2)	Not a factor at all (3)
Distance from campus (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It is difficult for me to attend in-person events (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I can't easily get to the Friday Center (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other groups (e.g., neighborhood association or CCRC) that offer similar benefits (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have concerns about infection (e.g., COVID) (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family responsibilities (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am too busy (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am not interested (8)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am not really aware of ways to engage (9)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I don't know others who participate (10)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost not worth it (11)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q24 Is there anything else you think it would be helpful for us to know as we work to improve the organization, its functions, or how we communicate with members or potential members?

Q25 Your answers are confidential, but as a thank you for completing the survey we would like to offer you the chance to be entered into a drawing by entering your name, email, and phone number below. Raffle will allow 10 winners to choose from the following prizes. A. a free reservation at an RFPA luncheon of your choice for you and a guest (for current members) B. a free one-year trial membership in the RFPA (for non-members) C. a \$20 gift card at a local independent bookstore Enter Name, Email, Phone number here:

Name (1) _____

Email (2) _____

Phone (3) _____

Which prize do you prefer if you are selected. (A, B, or C)

Q31 If you are interested in joining or re-joining the RFPA, the next page will redirect you to our website. We welcome you!