



AN ANTHOLOGY OF ACADEMIC TRANSITIONS

FACULTY FACTORY INTERVIEWS ON
RETIRING & REWIRING

A FACULTY FACTORY BOOK

An Anthology of Academic Transitions:

FACULTY FACTORY INTERVIEWS ON
RETIRING & REWIRING

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ISBN: 9798176275223

THIS BOOK'S MISSION

The purpose of this book is to serve as an unbiased road map for nearly every facet of major transitions and the retirement journey. It is built from the experiences and insights drawn from the Faculty Factory's rich archive of incredible guest interviews.

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ACKNOWLEDGMENTS

The Faculty Factory Podcast is proud to be sponsored by the Office of the Provost at the University of Texas Medical Branch (UTMB). We are grateful to Jochen Reiser, MD, PhD, President of UTMB and CEO of UTMB Health System, and Susan Chubinskaya, PhD, MS, Senior Vice President, Provost, and Chief Academic Officer, for their continued support.

The Faculty Factory Podcast is hosted by Kimberly A. Skarupski, PhD, MPH, whose vision and dedication have shaped this podcast and this book from the very beginning.

We would also like to thank the following guests, whose interviews form the heart of this book: Lawrence Appel, MD, MPH; Yuval Bar-Or, PhD; Janet Bickel, MA; Ann Brown, MD, MHS; Oscar W. "Skip" Brown, MD; Peter Densen, MD; Vicki Freeman, PhD; Darrell G. Kirch, MD; Jeffrey M. Lyness, MD, FACPpsych; Michael Malloy, MD; David Niesel, PhD; Susan M. Pollart, MD; Jochen Reiser, MD, PhD; David A. Rogers, MD, MHPE; Paul Rothman, MD; Angela Sharkey, MD; Kimberly A. Skarupski, PhD, MPH; David J. Skorton, MD; Patrick O. Smith, PhD, ABPP; Wiley "Chip" Souba, MD; Donna Vogel, MD, PhD; Cary C. Ward, MD; Wendy Ward, PhD, ABPP, FAPA, FNAP; Carol Ziminski, MD; and Brian Zink, MD.

Their generosity in sharing their stories, insights, and hard-won lessons is the heart of this book. Thank you to Casey Callanan, MBA, who served as copywriter for this project.

Faculty Factory episodes drop every Friday since 2019 and with more than 400 episodes, at time of print, the show and its YouTube channel have had more than 170,000 total downloads from listeners in 137 countries, and the Faculty Factory website has drawn nearly 85,000 web visits from users in 141 countries. Visit FacultyFactory.org for a host of faculty development-related books, published literature, links, and resources. Readers can also check-out the Faculty Factory YouTube channel which houses archived episodes, sorted by faculty development topic and follow us on Twitter and LinkedIn.

INTRODUCTION

Aging is fun, and funny. Those of us who have been blessed by the wizening and wisdom know that aging beats the alternative! And we joyfully share the funny emails, jokes, books, cartoons, greeting cards, and memes poking fun at the aging process and “the elderly.”

Many of us have also caved to the ever-increasing societal pressure to maintain/create that “youthful glow” via the cosmeceutical, fitness, and social influencer industries. This apparent anti-aging bias and stigma has not escaped the hallowed halls of academia.

We have an aging population and hence, an aging workforce. In the U.S. noninstitutional population, more than one-third (37.6%) of us were age 55+ in 2024. For additional context, the baby boomers (born between 1946 and 1964) are now all age 60+ and constitute roughly 22% of the U.S. population.

The Gen X’ers (born between 1965-1980) are 46-61 years old and make up approximately 19% of the U.S. population, and the Millennials (born between 1981-1996) are 30-45 years old and comprise ~22% of the population.

Like the rest of the U.S., the academic health faculty workforce is also aging. As of December 2025, almost half (42% [90,396/213,571]) of full-time medical school faculty at all U.S. medical schools were age 50+ and the average age of all full-time medical school faculty was 49.1.

As advanced-career faculty members, we may be sensitive about our age, secretive about our retirement plans for fear of being ‘written-off’ as irrelevant and non-essential, or even blithely unaware of and disinterested in a life after academia.

But when life challenges us to think about the “what if...,” we may realize that we have no idea about how to plan our next steps and we likely get little to nothing from our institutions by way of mentorship, sponsorship, or coaching for optimizing the transition into our next chapter.

Faculty affairs and faculty development deans have historically focused disproportionate program and resource effort toward early- and mid-career faculty members. We tend to know about and provide less for our advanced-career faculty members.

If you’re in academia, search on Google for your office of faculty affairs/office of faculty development. You will likely find information about academic appointments and promotions, new faculty orientation, awards and celebratory events, and a wide array of career and professional development, mentoring, and leadership programs and resources – most all geared towards early- (instructors and assistant professors) and mid-career (associate professors) faculty members. Sigh.

You may be surprised to find anything focused on advanced-career (associate professors at rank for 10+ years/professors) faculty members. You may find seminars addressing Social Security, Medicare, or your retirement benefits – likely sponsored by Human Resources. Double sigh.

Few of us will find programming addressing, for example: leadership competencies in advanced-career stages; succession planning; leveling-up our mentoring, educating, clinical, research, administrative games for the younger generations of learners, faculty, and patients; adapting AI (augmented intelligence) tools into our decades-rich portfolios; preparing

for career/life transitions into other leadership roles, institutions or industries; exploring options such as part-time employment, consulting, contracting; caregiving for spouses/partners/parents/grandchildren; and crafting identity, purpose, meaning, and community in our next chapters.

It is justifiable that our institutions invest heavily in the early- and mid-career phases of the faculty lifecycle. Institutions strive to attract, recruit, train, retain, promote, and develop the world's best educators, investigators, clinicians, and administrators.

However, here's a metaphor to consider...investing in a fancy, new sportscar, equipping it with the best accoutrements, filling it with the highest-grade gasoline, maintaining it via thorough tune-ups, and showcasing it at the best races, competing, and winning...and then abandoning it in a garage when the newer, fancier model debuts, may be short-sighted (*nod to my friend Dr. Charlie Irvin at the U. Vermont who uses that metaphor to bemoan the fact that we don't EVEN do all those things with our early-career faculty but we still expect them to race, compete, and win*).

So, do we treat our advanced-career faculty members like those abandoned cars? Are we failing to adequately leverage our advanced-career faculty brain trust?

Have we sacrificed helping our advanced-career faculty to secure *landing pads* over helping our early-career faculty establish *launch pads*? What can we do to maximize the gains from these transitions for both faculty members and our institutions?

In this rich anthology, you'll reap the fruit of our colleagues' labor as they have so graciously shared their wisdom on the Faculty Factory Podcast. You'll learn the who, what, when, where, why, and how from faculty leaders across the country who have made transitions.

I loosely grouped the podcast episodes into the Prochaska and DiClemente stages of change framework buckets: precontemplation; contemplation; preparation; action; and maintenance and then a "Pod-Potpourri" with episodes that just seem like they should come along for the ride. We know you'll find many gems.

But before you start...circle a couple “Re” words that Resonate...

Reboot, Refresh, Re-do, Reactivate, Recharge, Renew, Replenish, Renegotiate, Re-energize, Rejuvenate, Restore, Re-purpose, Re-brand, Re-invent, Redirect, Re-focus, Reimagine, Reframe, Re-evaluate, Reactualize, Realign, Reallocate, Re-envision, Re-tool, Re-structure, Re-strategize, Revisit, Retread, Reacclimate, Reacquaint, Reinspire, Refine, Rewire, Retire...

Enjoy the book.

Sincerely,

Kimberly A. Skarupski, PhD, MPH

Vice Provost, Faculty Development (Office of Faculty Development)
The University of Texas Medical Branch (UTMB)

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CHAPTER 1 PRECONTEMPLATION

Navigating a “Decision to Transition” in Academic Health with Jochen Reiser, MD, PhD

Summary

Starting the process of making a major transition decision like retirement does not have to be something you avoid until you are late in your career. Being strategic about decision making involves planning and being intentional, rather than allowing circumstances to unfold by default.

Getting to the essence of what strategic decision making (and being decisive) should look like, especially in the face of making a transition with major impact on our lives, is what our guest, Jochen Reiser, MD, PhD, walks us through in his first-ever appearance on the Faculty Factory Podcast.

Since 2023, Dr. Reiser has served as President of The University of Texas Medical Branch (UTMB) and CEO of the UTMB Health System. He is a professor in the John Sealy School of Medicine and is the John D. Stobo, MD Distinguished Chair.

We are forever grateful to Dr. Reiser as his support of the Faculty Factory project has remained steadfast. Under Dr. Reiser’s leadership we are sponsored by UTMB’s Office of Faculty Affairs, with Susan Chubinskaya, PhD, MS, serving as the Senior Vice President, Provost, and Chief Academic Officer.

A Celebration of Transitions

Dr. Reiser began his journey in Germany, where he earned his medical degree and, like all physicians trained in the German system, was required to complete a research thesis to receive the M.D. designation. What typically takes three to four months became a five-year immersion in kidney disease and molecular biology research. That detour changed the course of his career and earned him an invitation to the United States.

Thus came the first major transition of his career — a move to New York City where he worked as a postdoctoral fellow at the Albert Einstein College of Medicine. He soon found the United States to be his permanent home.

“And who does not fall in love with New York? And then from there, I did my internal medicine residency at Einstein, and then followed by my nephrology fellowship in Boston,” he said.

Taking the Best Attributes from Each Destination

After Boston, Dr. Reiser's career led him to Miami and Chicago before he arrived at UTMB in 2023. For him, one of the greatest rewards of knowing when it was time to make a move was the chance to learn from the unique strengths and cultures of each institution along the way.

"I'm grateful to all the places I've been, because each one had different strengths," he said.

Over time, those experiences helped shape a leadership approach that draws from the best attributes of every organization he served.

The True North

For Dr. Reiser, navigating a career transition starts with identifying your "true north" — the values and sense of purpose that serve as your internal compass. He believes leaders should revisit that compass regularly and use it as a steadfast guide when evaluating new opportunities.

"From time to time, you need to look in the mirror and ask, 'Is this still the place where I want to be part of this mission?'" Dr. Reiser said.

He went on to remind us to be honest with ourselves. If the answer is "no," or if you are unsure, it is time to take a serious look at what your options are for a significant transition.

Revisiting What Brings You Joy

When asked what someone should do if they lose their true north, or if it has changed, Dr. Reiser said it is important to recognize that, because there are many factors that can complicate a career, the first step is to pause and identify what is driving that feeling.

If something like clinical care becomes too burdensome, he recommends engaging with the younger generation. Dr. Reiser finds himself reinvigorated by conversations with young, energetic minds that remind him what is so foundational and meaningful about this work.

Making use of the ecosystems available at academic institutions is another vital takeaway from this conversation. These settings are rich with resources, both tangible and intangible. They include people who can help guide difficult decisions about transitions. Never hesitate to lean into that support.

If you find yourself slipping into a negative mindset, seek out the young minds in training at your institution. The happiness and reassurance that can emerge from those conversations should not be underestimated. And when you are in those conversations, Dr. Reiser encourages deep, careful, intentional listening.

"I have become a much better listener, and I listen even in areas where I consider myself perhaps the expert. When it comes to molecular science, I feel like I have a lot of knowledge. That's what I've done from early days on. Yet, I find myself listening to a student or a resident or an early-career professor with a good idea, and I truly listen to it," he said.

Key takeaways summarized from this podcast:

- Know your true north and protect it. It will serve as an inflexible pillar supporting every major decision you make.
- Embrace the resource-rich environment of your academic institution to support your decision-making process.
- Always be listening, even when you consider yourself the expert in the room. Every conversation is an opportunity to learn.
- Absorb what's best about the culture of every institution and setting you experience and take that with you as your journey marches forward.
- Do not underestimate the value of cross-generational connection to help you “rediscover the joy.” Engaging with those earlier in their careers can rekindle your own sense of purpose at any stage of your career, including retirement.

Listen to the full interview here: <https://facultyfactory.org/jochen-reiser/>

Adaptability for Success at Any Stage of Your Academic Health Career with Janet Bickel, MA

Summary

As a coach, many of Janet Bickel's clients are faculty members in the advanced-career transition phase. In addition to their acquired expertise, health professions faculty often still possess a great deal of energy. Retirement doesn't fit their identity.

Working with this type of faculty sparked Ms. Bickel to collaborate with Kimberly Skarupski, PhD, MPH, the host of the Faculty Factory Podcast. Dr. Skarupski is not only a coach but also a seasoned professional in faculty development and gerontology. Together, they co-authored a letter to the editor addressing this phenomenon.

Their collaboration resulted in the published letter titled "Helping Medical Education Faculty Navigate a Post-Academic Landing Pad" in the journal *Academic Medicine*. The letter discusses how institutions can better support faculty in these advanced career stages as they transition into retirement. This topic has no doubt gained prominence, especially since 21% of faculty in U.S. medical schools are aged 60 and older, according to *Academic Medicine*.

Ms. Bickel is an acclaimed leadership and career development coach with five decades of experience in academic health and science. She joined the podcast in 2025 to further discuss the letter to the editor and explore how institutions can assist this talented pool of faculty in navigating this "post-work phase." As she notes, "transitions are always chaotic, but they offer opportunities for a creative reexamination."

Facing a calendar filled with open space can be disorienting. For many, this may be the first time in their lives without an immediate goal or vision to pursue. But who can feel sorry for professionals facing unrestricted leisure time? For high-achieving individuals, this phase can be both lonely — particularly because many mentors have passed on — and challenging in an unfamiliar way. Ms. Bickel and Dr. Skarupski have observed that many faculty members struggle to discuss these feelings.

What Are You Seeking out of Life Now?

Ms. Bickel recommends that as faculty enter the final phases of full-time work, they slow down enough to reflect on the arc of their lives.

"In order to develop new sources of meaning in this phase, reflection on one's own skills, privileges, blind spots, and strengths is useful," she said.

As you consider what you want to gain from both your final years as a full-time faculty member and your retirement, it is helpful to reflect on trends throughout your career, such as:

- Where was the fit good?
- What were the sacrifices?
- What grudges are you still holding on to?
- Are you looking for more comfort or more challenges?

Articulating what's most important at this point prepares you to create an effective plan going forward.

Ms. Bickel encourages people to talk to others in their network who have retired and ask them what they're learning about this transition and about the resources and strategies that have helped.

The Skills of Faculty are "Different"

The skills that go into building a high-achieving career in academic health are different from the skill set required to build a successful retirement, as Ms. Bickel points out.

"There is a greater premium on intellectual humility as we enter the last third of life," she said.

Part of finding meaning in the retirement years involves expanding your comfort zone and trying new activities for their own sake (like volunteering). This can be a challenge for academics who are used to "telling people what the answer is."

An open mind, curiosity, reflection, pausing, and slowing down — these are the keys to success in the retirement phase. The good news is that most faculty are observant and curious by nature.

Sacrifices and Adjustments Will Be Needed

In the closing moments of the show, Ms. Bickel discusses accepting responsibility for your own continuing growth and development. You can make this self-assessment frequently by asking yourself:

- Does this activity fit with my strengths and values?
- Which of my commitments are competing?
- What are the trade-offs?
- How can I become a more versatile communicator?
- How can I better access my own acquired wisdom?

Ambivalence is normal as you come to terms with the adjustments you'll be making, which may require sacrifices.

With its reduction of internal and external requirements, the end of a career can open into a rewarding spaciousness. No need to make optimum use of time, so it's easier, for example, to relax in traffic and on queue. The pressure is off. Success may come to be understood as freedom from ceaseless striving, normalizing this post-work phase.

Looking for one last nugget of motivation? Ms. Bickel and Dr. Skarupski both agree in the closing minute of the podcast that you should never put off until tomorrow what you can accomplish today.

Key takeaways summarized from this podcast:

- The transition into retirement encourages a creative reexamination of faculty members' lives and the challenges they've already met.
- Oftentimes, high-achieving faculty members struggle with the idea of retirement, postponing necessary discussions. This is normal and not a sign that something's wrong. Slowing down and reflecting on their career arc helps them identify strengths and challenges, encouraging clarity on what they want from this post-work phase.
- The skills required for a successful career in academic health differ from those needed for a fulfilling retirement.

Listen to the full interview here: <https://facultyfactory.org/adaptability-for-success/>

Why Faculty Should Consider a "Phased Rewirement" Plan with Patrick O. Smith, PhD, ABPP

Summary

Patrick O. Smith, PhD, ABPP, presents a blueprint for what he calls "phased rewirement" and reflects on what he's learned about succession planning and leadership continuity drawing on the wisdom he's gathered over a highly impactful career in academic health and leadership.

When this episode was recorded, Dr. Smith was serving as the Chief Faculty Affairs Officer and Associate Dean for Faculty Affairs at the University of Mississippi Medical Center (UMMC) in Jackson, Mississippi, where he also served as a Professor of Family Medicine.

Even if you are not considering retirement anytime soon, this interview is a fantastic resource for those who would like to learn more about succession planning for any leadership role within their institution.

The Story Leading up to "Phased Rewiring"

As Chief Faculty Affairs Officer, Dr. Smith started contemplating how he could gradually transition out of the role and enjoy more of life away from the routine of coming into the office every day.

The next step was to create a succession plan and identify who had demonstrated the skills and competencies needed for UMMC's next Chief Faculty Affairs Officer. This entailed Dr. Smith and his senior leadership colleagues identifying those individuals and the "sponsoring" conversations began on who best to serve UMMC in this role.

After identifying the candidate who checked those boxes, they invited that person to join the Office of Faculty Affairs at 25% effort. This arrangement continued for two years while Dr. Smith remained 100%.

Two years later Dr. Smith's time was adjusted to 75% and his successor moved to 50%. A year after that, the goal was for Dr. Smith to be at 50% and his successor at 75%. After that point, Dr. Smith planned to leave it to his successor to execute their own vision for the future of the office.

“There is a slow transition of me easing out over time and my successor easing in over time,” Dr. Smith said, adding that his successor is participating in an executive coaching program and shadowing him during vital tasks such as conducting a search for the School of Dentistry’s new dean.

With less time at the office, he has spent more time on activities like fellowship, cycling and travel. As he notes, this is why he calls it a “phased replenishment” as well as a “rewirement.”

The Chair Optimization Program and Continuity of Leadership

How did this all start? According to Dr. Smith, the idea grew out of a program he developed about 15 years earlier called the Chair Optimization Program, in which he worked closely with 23 department chairs who in turn supported 850 faculty in the School of Medicine. This program focused strongly on the faculty lifecycle, which of course includes transitions.

“Some transitions are expected; some transitions are not. Some are acute and some are chronic; so that’s what got us into thinking about succession planning,” Dr. Smith said.

In addition to formalized chair succession plans, he added that looking at levels of engagement and service across campus and patterns of committee work helped UMMC identify stand-out individuals, determine where they were located within academic units, and view them as potential successors to leadership positions.

Through this experience he began considering his own succession planning.

This strategic approach to succession planning at UMMC has led to what Dr. Smith calls a reputation for “continuity of leadership.” Another key to its success has been informing faculty in advance of leadership transitions and succession plans so nothing in this really comes as a surprise.

People Planning and Transitions

In the closing moments of the interview, Dr. Smith addresses a common misconception often heard around leadership transitions: “no one can replace individual X.” He debunks this fallacy by reflecting on decades of lessons learned from his own career.

“I learned a long time ago that there are a thousand different ways to do almost anything — and who is to say which is best or right?” he said.

At academic health science centers, the focus is often on buildings, bricks and mortar, and policies and procedures, but, in Dr. Smith’s view, nothing is more important than the people.

“People planning is the key to a thriving and flourishing organization within your building — think about what you need to do differently to implement people planning successfully,” he said.

Key takeaways summarized from this podcast:

- “Phased rewirement” includes gradually reducing effort while incrementally increasing the successor’s role to ensure a smooth handoff and strong transparency in leadership transitions.
- As your level of effort is reduced, you can dedicate more time to activities outside the workplace; for Dr. Smith this included travel, leisure time with family, and exercise.
- Dr. Smith encourages proactively identifying and recruiting candidates, starting them at partial effort, and using shadowing and coaching to build competency before full transition.
- Be wary when someone says a certain person cannot be replaced; Dr. Smith has learned there are many different ways to accomplish almost anything.

Listen to the full interview here: <https://facultyfactory.org/patrick-smith-faculty/>

Helping Ourselves Through Helping Others in Academic Health with Susan M. Pollart, MD

Summary

In this insightful interview, Susan M. Pollart, MD, underscores the impact of supporting faculty at all stages of their careers, with particular attention to transitions later in life. She thoughtfully examines the concept of phased retirement and highlights the necessity for institutional flexibility to facilitate such transitions. Dr. Pollart is an esteemed faculty development leader, serving as Senior Associate Dean for Faculty Affairs and Faculty Development at the time of this interview.

As noted at the outset, Dr. Pollart finds it invigorating to continually foster the success of her colleagues throughout their professional journeys, especially during pivotal transitions when peer support is most essential. She takes great satisfaction in helping faculty achieve those transformative "aha" moments, which she considers among the most rewarding aspects of her work. Additionally, she reflects on a particularly illuminating phase of her own career, during which she contributed to the academic mission in a part-time capacity.

Nearly two decades ago, a meaningful conversation with her friend and colleague, Dr. Luanne Thorndyke, profoundly shaped her perspective on the importance of studying and sharing the value of part-time roles within academic health. Since then, in collaboration with colleagues at the Association of American Medical Colleges and other academic medical centers, she has explored the professional satisfaction of part-time faculty members.

From this work, Dr. Pollart recognized that part-time contributions are found to be fulfilling by many of those who take them on and she encourages all faculty, especially those approaching retirement, to consider such roles during periods when full-time commitment may be challenging. She explains, "I'm truly passionate about encouraging individuals to view part-time work as an integral part of their career trajectory—not as a loss, but as an opportunity to recalibrate and find respite," referencing her enlightening discussion with Dr. Thorndyke.

When navigating transitions and major decisions such as retirement, Dr. Pollart emphasizes the importance of self-reflection, understanding both one's current position and future aspirations.

At the time of this interview, Dr. Pollart was well into her career, beyond traditional retirement age, yet remained eager to contribute. This prompted her to consider how best to make an impact during this stage of her professional life.

At the University of Virginia School of Medicine, Dr. Pollart discusses the value of the phased retirement option available to faculty. This two-year program allows individuals to gradually reduce their workload while retaining many essential benefits, offering an opportunity to “dip their toes” into retirement.

She observes that this period enables faculty to begin discovering their identities beyond their institutional roles, which can be a transformative experience for those accustomed to the fast-paced environment of academic health.

“I appreciate that faculty have the chance to explore during this two-year window,” she said. Dr. Pollart believes this transitional phase advances the realization that personal identity extends beyond professional affiliation, a valuable insight. She also makes another thing absolutely clear: *she has never witnessed a faculty member regret the decision to retire.*

Dr. Pollart advocates for career models that enable individuals to adjust their professional commitments based on their capacities at various life stages. Such models, she asserts, not only help prevent burnout but also create mutually beneficial outcomes for both faculty and their institutions.

Toward the conclusion of the interview, Dr. Pollart recommends the book “Mass Career Customization: Aligning the Workplace with Today's Nontraditional Workforce” by Cathleen Benko and Anne Weisberg. She suggests it as an excellent resource for faculty seeking further insight into workplace flexibility.

Key takeaways summarized from this podcast:

- Providing support and flexibility to faculty at all career stages, especially during transitions, is instrumental in preventing burnout and benefiting both the individual and the institution.
- Phased retirement and part-time roles offer rewarding opportunities for experienced faculty to recalibrate their professional engagement.
- The two-year phased retirement option at the University of Virginia School of Medicine enables faculty to explore interests beyond academia and reduces regrets associated with retirement.

Listen to the full interview here: <https://facultyfactory.org/helping-others>

Investing Basics for Faculty and Retirement Planning with Yuval Bar-Or, PhD

Summary

In a different segment, “Considerations for Life After Full-Time Employment in Academic Medicine with Lawrence Appel, MD, MPH,” Dr. Appel discusses the need to understand your primary concerns heading into retirement.

He mentions “financial unease” as a common concern many people face when approaching retirement. With that in mind, we were very grateful to have Yuval Bar-Or, PhD, join us to discuss investment and financial retirement planning basics, hopefully helping us put some of that unease to rest.

In his trademark style, Dr. Bar-Or delivered this interview in plain language, so that anyone could follow along, regardless of their financial acumen.

Financial services is a field full of confusing terms and jargon. Dr. Bar-Or reminds us that this confusion is often intentional, so that less-than-benevolent professionals can lead you to trust them in whatever path they recommend, even though the incentives are not aligned with your best interests.

Know Your Net Worth

Dr. Bar-Or is a Full Professor at the Johns Hopkins Carey Business School. As we quickly learn from him in the opening moments of this interview, it’s important to understand the fundamental concept of net worth when it comes to initiating any conversation about the financial aspects of retirement planning.

Your own net worth is something you should know. It’s the total net financial value you have accumulated over your lifetime, and we rely on it to take care of our own financial needs and, in many cases, those of our family (elderly parents, children's education, etc.).

You can calculate your net worth by taking the total value of your assets (everything you *own* with a value—like your house and retirement

accounts) and subtracting from that your debts (everything you *owe* to others). The difference between your assets and debts is your net worth.

“The name of the game in financial planning is to build that net worth over time to achieve a number large enough to support us in a dignified fashion for our financial needs,” Dr. Bar-Or said.

Managing Anxiety in Planning

To manage your anxiety around the uncertainty that comes with investing, you can put your assets into less risky investment vehicles, such as “fixed-rate” bonds. However, Dr. Bar-Or also notes that you must be careful about being overly risk-averse. You need some risk to make sure you are able to grow your nest egg to a sufficient level, since less risk will almost certainly mean less upside in terms of financial returns.

Only Engage in Good Debt

Dr. Bar-Or reminds us to be mindful of the difference between “good debt” and “bad debt.” For example, owning a home is considered good debt because you are paying off a substantial asset and may receive tax benefits on the mortgage’s interest. Another example of good debt is investing in yourself to obtain a higher degree that could lead to a higher salary down the line. Bad debt may include something along the lines of taking a high-interest personal loan to go on an unnecessarily extravagant vacation.

“If you’re taking on debt, that money has to eventually do something and work for you,” he said.

Investing on Your Own

Over the course of this interview, Dr. Bar-Or continued to reiterate that none of the basic elements of retirement planning and saving for retirement are rocket science. It takes no higher than a 10th-grade level of math to understand these calculations.

We can choose to play this game on our terms by deciding to educate ourselves and manage our own investments. The obvious option might be for busy professionals to outsource this to someone they trust, but the challenge is—who do you know and how can you verify their

trustworthiness? That's why Dr. Bar-Or urges faculty to learn the basics, so they can avoid bad advice and prevent abuse and outright theft in wealth management and retirement planning. Even just learning the basics allows you to outsource from a position of strength.

At the end of the day, investing is about taking risks with a view toward obtaining a return or reward. Making these financial decisions involves balancing risk and reward.

Be very careful about fees when setting up a retirement account, or having someone do it for you, as fees can come from both the advisors and the funds you invest in. Even a fee of just 1 percent can be very burdensome when compounded over time, Dr. Bar-Or reminds us. You should consider passively managed, low-fee funds, which you can easily set up by opening an account yourself.

Passive Investing and the “Need to Play”

Stocks, bonds, real estate, and cash are the main asset classes faculty should be familiar with, as they are the “tried and true” asset classes. However, there are also alternative asset classes that carry higher risk, which may be best avoided by do-it-yourself investors, as they entail complexity and high fees.

Either way, you need to participate in some form of investing and be mindful of the following:

- Sitting in cash alone will see inflation eat away at your purchasing power.
- Sitting in cash likely won't allow your nest egg to grow fast enough to meet your goals.
- Avoid high fees.
- Don't try to “time the market.”
- Don't chase fads, no matter how seductive or glamorous they seem.

Retirement Planning and Building the Nest Egg

As the interview concludes, Dr. Bar-Or discusses the two phases of retirement: the buildup phase, when you are accumulating your nest egg, and the withdrawal phase, when you are using those savings to fund your life.

During the “build-up” period, the goal is to accumulate diverse appreciating assets while minimizing fees as much as possible. The second phase involves managing those assets to generate income throughout retirement—the stewarding period.

Dr. Bar-Or also cautions people to be careful about factoring in Social Security to this entire equation. He highlights the risks of insolvency associated with Social Security and advises treating it as a bonus rather than relying on it in your financial planning.

“Ignore it in your calculations—if you can, that ensures you’ll be planning conservatively,” he said regarding Social Security.

In the final moments of the interview, Dr. Bar-Or reminds us that unexpected expenses can and will happen. The best way to prevent them from jeopardizing a happy retirement is to “know your numbers” up front and have a store of emergency cash.

If you’re considering home renovations or any other unexpected expenses you didn’t originally plan for, the key is to review your numbers first. Keep a document tracking your net worth and maintain a budget to see if you are balancing your finances well. Start these documents now so that you can make informed decisions about taking on additional debt in the future.

Key takeaways summarized from this podcast:

- The discussion centers around the importance of knowing your net worth (a.k.a. nest egg), investing basics, and financial retirement planning.
- The unbiased facts that Dr. Bar-Or presents are rare in the world of financial information. He shares these as part of his broader Pillars of Wealth initiative for medical professionals, which you can learn more about at: <https://www.pillarsofwealth.com/>
- Learning the absolute basics can help avoid poor advice and prevent abuse and outright theft that can occur in wealth management and retirement planning. At the very least, it will allow you to delegate your financial planning from a position of strength.
- When investing, there are four tried-and-true asset classes: stocks, bonds, real estate, and cash. Remember: never pay high fees; never try to “time the market;” and never chase fads—however seductive and glamorous they may seem.

Listen to the full interview here: <https://facultyfactory.org/investing-basics-for-faculty/>

CHAPTER 2 CONTEMPLATION

Advice for Mid- and Advanced-Career Faculty with Brian Zink, MD

Summary

Brian Zink, MD's memorable appearance on the Faculty Factory Podcast centered on strategies for avoiding a mid-career slump.

This discussion offers many pearls of wisdom related to mid- and advanced-career stages that faculty approaching retirement should consider. These insights can help someone escape a rut at any stage of life or career, especially when preparing for retirement.

The podcast opens with Dr. Zink quoting Seneca:

“If a person does not know what port, they are steering for, no wind is favorable.”

You won't be able to take advantage of the prevailing wind if you don't know where you are going, and that sentiment rings true whether you are new to the profession, in the throes of mid-career, or on the verge of retirement.

At the time of the podcast's original publication in October 2020, Dr. Zink was a Professor of Emergency Medicine and Senior Associate Dean for Faculty and Faculty Development at the University of Michigan Medical School in Ann Arbor.

In 2020, Dr. Zink was named interim Executive Vice Dean for Academic Affairs with Michigan Medicine, which included service as interim Chief Academic Officer.

Dr. Zink has some helpful tips for those approaching retirement age. He references the typical happiness or contentedness curves of life, which indicate a strong rise in happiness starting around age 55 and onwards.

What this also means is that the highly active mid-career years often come with an undertone of discomfort. It is a time when building a career, family, and managing stressors such as aging parents will commonly cause a dip in happiness. According to Dr. Zink, fighting off this unhappiness takes intentionality in finding ways to regain satisfaction, purpose, and joy.

Dr. Zink provides insights to help faculty rediscover their purpose and be more intentional about what they want to be doing.

Even though retirement tends to be associated with some of the happiest stages of life, a rut can arise at any season of life. The old cliché that “too much of a good thing is a bad thing” can certainly prove to be true in retirement with a windfall of leisure time. If you find yourself in a rut, returning to your purpose in life is key—try to reflect on what got you here.

The diagram Dr. Zink references to help faculty process all this involves four key self-reflection questions:

- What do I love doing?
- What does the world need?
- What are my strengths?
- How can I make a living doing all of the above?

“If you put all of those four things in the middle of a diagram, you will find your calling when you intersect those four aspects,” he told us.

Again, the beauty of heading to retirement is that the fourth item—"what can I get paid for?"—may be less of a concern depending on your level of financial planning.

Dr. Zink encourages faculty to set aside time for personal reflection to write a mission-and-values statement that outlines their top priorities. Having a mentor, coach, or therapist can also assist with this.

A peer mentor can be especially helpful, and they do not necessarily need to be more advanced in their career than you to provide value. It's also important to remember: "A mentor can help you with all of this, but no one can really do it for you."

Key takeaways summarized from this podcast:

- Self-awareness and reflection are essential: Use questions like "What do I love doing?" and "What are my strengths?" to identify your purpose and calling, especially when approaching retirement.
- Happiness often increases after age 55, but mid-career years can come with stress and dips in happiness; fighting unhappiness involves intentional purpose and doing those things that bring you joy. And ditching those things that do not.
- No matter the life stage, reflecting on what motivates you and aligning your actions with your values helps prevent feeling stuck in a rut.
- Seek support and guidance: Mentors, coaches, or therapists can aid self-reflection and purpose-finding; remember, ultimately, the process is personal and driven by you.

Listen to the full interview here:

<https://facultyfactory.org/advice-for-mid-and-late-career-faculty-with-brian-zink-md/>

New Horizons to Explore at the Top of the Academic Health Mountain with Paul Rothman, MD

Summary

Given his roles as Dean of the Johns Hopkins University School of Medicine and CEO of Johns Hopkins Medicine, Paul Rothman, MD, reached what some may call the pinnacle of a career in academic health.

Yet, Dr. Rothman's story ultimately underscores the cliché that life is a journey, and there really is no final destination. Even when you reach the "pinnacle," life continues, and you must keep seeking new challenges to grow, learn, and find happiness. This is critical to remember as you approach retirement which is often viewed as a pinnacle or destination at the end of a career.

Making an impact is Dr. Rothman's true north. As he explains in this interview, he discovered that the most significant impact he could make evolved throughout his career. That's why embracing change is so important to his story.

Once Dr. Rothman entered the retirement season of his life, optimizing how he could make the greatest impact became his new goal.

Throughout his career and its major transitions, he took the time to learn new roles carefully and to understand:

- How his decisions would impact people.
- How to delegate operations.
- How to focus on strategic decisions.

However, at some point, as he told us, you simply have to experience a new role, jump in, and develop your own style. The same is true with retirement: eventually you just have to start and figure out your own way.

Another theme in Dr. Rothman's journey, as he describes it in the interview, is the ability to navigate the unknown by maintaining a sense of curiosity and by doubling down on the art of listening.

What Does a Dean Do When They Stop “Dean’ing?”

Toward the end of the interview, Dr. Rothman faces a tough question: what exactly do you do when you stop being a dean?

It’s a question that has long confronted high-achieving professionals in academic health who are trying to replace the stimulating nature of full-time work in education, leadership, scholarship, and patient care.

For Dr. Rothman, he didn’t initially know what he would do, but heard the author Jim Collins (of “Good to Great” fame) discuss what to do when one’s time in traditional full-time employment ended.

“One of the things that resonated with me was trying to figure out how you can uniquely contribute to the world,” he said.

When he stepped down from his tenure as Johns Hopkins Medicine CEO, he took a sabbatical year and returned to the bench for nine months to conduct hands-on research in the style of a postdoctoral research fellow.

Returning to what he loves is key for Dr. Rothman. Lab work was something he simply couldn’t pursue because of the strategic focus of his leadership roles, which had been his professional priority for the past couple of decades. Retirement offered a chance to return to that passion.

Additionally, he leaned into board work in the for-profit sector. He consulted with venture capital firms so he could continue doing the challenging, stimulating work he had formerly stepped away from. He also spent time assisting nonprofits to, as he put it, “keep very busy.”

Since this is an audio-only podcast, our host, Dr. Skarupski pointed out in the closing minutes of the episode how big of a smile Dr. Rothman had on his face as he described his sabbatical work in the lab and his other activities—indicating how content he has become in his “retirement” season of life.

Key takeaways summarized from this podcast:

- Even after reaching the “pinnacle of a career in academic health” the journey continues in the retirement season of life. You must keep seeking new challenges for growth and happiness.
- Embracing change and discomfort is essential for making a meaningful impact throughout different career stages, including retirement.
- Developing your own style through experience and curiosity is key to navigating new roles and transitions confidently.
- Doggedly pursuing passions such as research, board work, consulting, and volunteer opportunities can lead to a fulfilling and content retirement life.

Listen to the full interview here: <https://facultyfactory.org/paul-rothman/>

Knowing When to Shape the Next Phase of an Academic Health Career with Carol Ziminski, MD

Summary

Carol Ziminski, MD's decision to leave full-time employment as an associate professor of medicine at the Johns Hopkins University School of Medicine comes with plenty of teachable moments and inspiration.

The Academy at Johns Hopkins

This interview begins with an important reminder about the unique value The Academy at Johns Hopkins brings to retired faculty and beyond.

Cynthia Rand, PhD, a longtime contributor to this podcast, is referred to at the outset of the discussion by Dr. Ziminski as the “Godmother of The Academy.” Dr. Rand was actively involved in identifying what advanced-career faculty members might do as they approach the twilight of their careers. She focused on how these individuals could utilize their institutional and medical knowledge to help others, which ultimately led to the founding of The Academy.

The idea is simple: retired faculty have unique experience and exceptional wisdom, and it should be put to use when they want to stay active to help others. The idea could be applicable to any institution in academic health and hopefully others are inspired to launch an “Academy” of their own.

At the time of the recording, The Academy at Johns Hopkins had volunteers who had already contributed 9,000 hours of service. Yet, just as important is its role in social life. It serves as a place to mingle and offers ample opportunities for intellectual pursuits, which are vital for the mind and spirit during retirement years.

The Nuts and Bolts of Retirement

As part of her work with The Academy, Dr. Ziminski helped initiate the Nuts and Bolts of Retirement speaker series, which features outside speakers discussing many aspects of retirement, including topics such as:

- Medicare and insurance (including institution-specific plans).
- Financial and estate planning.
- Considerations for transitioning your lifestyle and where you live.

These sessions are not only for those currently in retirement but also highly applicable and helpful for those considering retirement, so they can stay educated on expectations as they approach it.

One of the Hardest Decisions

When it comes to Dr. Ziminski's own decision to step down from full-time employment and practice, she describes it as "one of the hardest decisions she has ever had to make." Administrative changes within her division were happening at the same time she was contemplating stepping down.

This made it feel like a more natural choice to make a change on her own in retirement, rather than trying to reestablish herself amid the ongoing administrative changes.

Dr. Ziminski admits that when she knew it was time to stop seeing patients, she wondered what would become of her identity. It was very difficult, and it remains an important challenge faced by many clinicians in our field. Nonetheless, she knew it was the "right thing to do at that time."

"You kind of know when the timing is right, and it is not the same for everyone, but you kind of know when it is time to make that change," Dr. Ziminski said.

The beauty of Dr. Ziminski's journey is that she stayed on as part-time faculty for several years after officially retiring from full-time practice, allowing her a nice "phase-down" period.

She also stayed active while winding down from patient care through her institution's Colleges Advisory Program, in which faculty members work closely and extensively with medical students.

As Dr. Ziminski mentioned in the latter half of the interview, one mentor is simply not enough for a medical student, and the same is certainly true for those in retirement—or heading there soon. Enriching your experience and multiplying your ability to make better decisions come from having multiple mentors and coaches at all stages of life, and this includes the “retirement season.”

Crafting Your Own Journey as Key

One undeniable takeaway from this discussion with Dr. Ziminski is that “there is no one-size-fits-all” situation here. No two journeys are the same, and there is no single best route for deciding:

- When you will step down from full-time work.
- What you will do with your time in retirement.

For Dr. Ziminski, as she laughingly says in the closing moments of the podcast, “she has been retiring for eight years,” all the while staying highly active while winding things down.

When it comes to deciding when it's time to walk away from full-time employment, Dr. Ziminski says, “You won't absolutely know until you've done it, and I don't think anything is truly irreversible either.”

She recalls many days when she thought she couldn't stop seeing patients, but not giving up everything all at once was key to her happiness. Stopping gradually worked for her, but for other folks in academic health, it might be best to step away all at once. Ultimately, it comes down to crafting your own journey by knowing your priorities and values.

A sabbatical can help you test the waters and see if the right decision is a change, knowing that nothing, of course, is truly irreversible.

“Medicine should be fun, and when you’re not having fun with what you’re doing, then something is wrong,” Dr. Ziminski reminds us. She adds that as you consider retirement, it’s important to ask yourself, “Are you having fun? If not, perhaps it’s time to regroup and reevaluate.”

Key takeaways summarized from this podcast:

- The Academy at Johns Hopkins exemplifies how retired faculty can stay active, share their wisdom, and contribute to community, highlighting the importance of ongoing engagement and mentorship in retirement.
- Deciding when to leave full-time work is a personal decision that can be gradual or abrupt, depending on the individual’s priorities and circumstances.
- There is no single best route or timeline for retiring; each individual’s journey is unique, and crafting a personalized path is essential.
- Enriching your retirement involves staying active, engaged, and seeking multiple mentors or coaches to help navigate this new phase of life.
- Regularly ask yourself if you are still enjoying your work or activities. If not, it might be time to regroup and reevaluate your priorities.

Listen to the full interview here: <https://facultyfactory.org/carol-ziminski/>

Developing Leadership Skills in Academic Health Centers with Wendy Ward, PhD, ABPP, FAPA, FNAP

Summary

Given that Wendy Ward, PhD, ABPP, FAPA, FNAP, has been a guest at the Faculty Factory a record 11 times, it's only fitting that she appears in more than one chapter of this book.

While her January 2025 visit for an episode titled “Developing Leadership Skills in Academic Health Centers” was not fully dedicated to retirement, the insights she shared for faculty entering advanced-career stages (and considering retirement) are substantial. We felt they deserved a standalone segment in this book.

It all kicks off with Dr. Ward covering the nuanced skill sets you need to develop throughout your career as a leader. These skills will help you build a reputation that will follow you on your journey as you enter your advanced-career faculty years.

In the advanced-career stage, you are likely managing larger teams and mentoring future leaders. The skills you should develop during this stage include:

- High-level strategic decision-making.
- Leading institutional or cross-unit initiatives.
- Building coalitions and strategic partnerships.
- Navigating institutional politics, legislative pressures, and stakeholder priorities.
- Talent development, mentoring, sponsoring, and coaching
- Planning for continuity and succession.
- Operational and resource stewardship with the goal of financial sustainability.
- Shaping culture, professionalism, psychological safety, and team wellbeing.
- Leading innovation and organizational improvement.

At this advanced-career stage, you're called upon to ensure that succession planning and the development of future leaders are optimized and carried out.

“Sponsorship and being an active sponsor as a leader is a very different role from that of a mentor or coach. A sponsor keeps an eye out for talent and connects that talent with resources, opportunities, and roles they are ready for,” Dr. Ward said.

Planning for your retirement transition by developing emerging leaders and having an identified succession plan is also key. There is an art to sponsorship and succession planning—something that those approaching retirement need to embrace.

Time Management Tips for Advanced-Career Faculty Leadership

As we draw closer to retirement, managing the finite amount of time at work that seems to slip away quickly becomes even more important.

To deal with this, some key time management skills are outlined by Dr. Ward towards the final ten minutes of this podcast. This wisdom can be especially handy for those who feel like their calendar is driving them instead of the other way around. Dr. Ward encourages listeners to:

- Be careful about who has access to see your full calendar and permission to schedule in it.
- Prioritize what is most urgent and delegate or decline what is not.
- Train others to manage your calendar.
- Delegate tasks to others for their development not just your relief.
- Use a “legacy filter” before accepting a new role or task—ask yourself if this could be an opportunity for someone else.
- Create “office hours” for controlled access.
- Protect strategic thinking time.
- Shorten and structure meetings.
- Build a succession dashboard that tracks major responsibilities, current owner, backup person, needed training, and transition timeline.
- Manage energy not just time.

The Emeriti Years

Dr. Ward works very closely with the UAMS Emeriti Society (retired faculty who have been awarded emeritus status upon retirement), and she has gleaned a lot from them.

She has learned from the Emeriti that in retirement, your natural tendency is to fill your time with tasks that bring you joy. Sometimes that includes demanding, purposeful roles such as charitable work, consulting work, or advisory committees; other times it is filled with hobbies, travel, and time with family. Time management can still be an important skill even in retirement.

She stresses that you must recognize the need to adopt a slower pace at some point.

That slower pace might not happen as soon as you retire; after all, the three phases of retirement tend to be the “go-go,” “slow-go,” and “no-go” years – and she doesn’t just think about that in terms of health and travel; it applies to engagement in activities that provide you with purpose and meaning.

She’s learned from her emeriti colleagues that you might retire and experience some strong “go-go” years and do amazing community-based, consultative, or advisory work, but over time, allowing yourself to reduce some of that demanding work and transition into a different pace – a different ratio of purposeful work to pleasurable activity – can help you find the ultimate joy of retirement.

“Defining that right balance for ourselves is what we all look forward to in retirement,” she added.

Key takeaways summarized from this podcast:

- While working on succession planning, the art of sponsoring a colleague to fulfill a new role requires a different skill set than mentorship and coaching. Take the time to understand and get educated on it.
- Time management is critical to success at just about any stage of your faculty career – and that includes the retirement and emeriti years.
- Embracing the transition from the “go-go” years into the “slow-go” and “no-go” years may be the best pathway toward a fulfilling and happy retirement journey.

Listen to the full interview here: <https://facultyfactory.org/leadership-skills/>

The Ultimate Pre-Retirement Conversation with Michael Malloy, MD

Summary:

At age 78, Michael Malloy, MD, found himself fully immersed in mentoring, clinical work, and scholarship. He made time to discuss his journey with contemplating an "intensely personal" decision, one he is still in the throes of for an important pre-retirement conversation on the Faculty Factory.

In what can only be described as the ultimate pre-retirement discussion, he opens up about a transition still very much in progress for him. He is a Professor in the Division of Neonatology in the Department of Pediatrics and the Emeritus John P. McGovern Chair in Oslerian Education at the University of Texas Medical Branch (UTMB).

"I've been on a glidepath to retirement for about the last 5 or 6 years," Dr. Malloy said.

For Dr. Malloy, the move toward retirement has been gradual and deliberate. His glide path began around 2019, following the passing of his wife of 45 years.

Should I Still Be Doing This?

One of the most compelling and candid elements of this conversation is Dr. Malloy's question, posed reflectively: At what point does continuing clinical work become a risk to patients?

"I don't want to be working when I'm potentially putting patients at risk," he said.

He reflects on this question often and takes it very seriously. He expects it will factor into the timing of his eventual full retirement from clinical work, but he is not there yet as of this podcast's recording. Dr. Malloy has yet to encounter the internal revelation that tells him it is time to step away from clinical medicine entirely.

For the work he loves, including scholarship, mentoring, and teaching, he has no desire to cut back. That work, he says, will continue as long as he is upright and thinking clearly.

Push vs. Pull

Another important distinction that is drawn out in this conversation is examining the difference between being pushed out of a role by circumstances and being pulled toward something new by a sense of calling or purpose.

For Dr. Malloy, his wife's passing was a push that reoriented everything. It brought mortality into focus and forced a reckoning with how to live fully in the time that remains.

"Until you understand death, you'll never understand living," he said, citing Seneca.

Dr. Malloy resists the urge to offer a checklist or a roadmap for retirement to listeners. It's an intensely personal decision that may not follow any sort of linear plan or path. What he does demonstrate is strong self-awareness, a clear sense of his values, and the willingness to reflect openly on a transition that is still unfolding.

"It's a uniquely personal process," he said. "Everybody goes through the process quite differently."

Key takeaways summarized from this podcast:

- Dr. Malloy has been on a gradual glide path toward retirement for several years, stepping back from the NICU first and then moving to 0.5 FTE, while continuing much of the same work he loves.
- He raises an ethical question that many physicians avoid: at some point, continuing clinical work may put patients at risk, and that consideration is actively shaping his thinking.
- Cutting back on FTE does not always mean cutting back on work. For the scholarship, mentoring, and teaching he finds meaningful, he has no plans to stop.
- His wife's death after 45 years of marriage reframed how he thinks about mortality, relevance, and what it means to live well in the time remaining.
- There is no universal trigger or timeline. Dr. Malloy is still waiting for the internal revelation that tells him it is time, and he is comfortable with that uncertainty.

Listen to the full interview here: <https://facultyfactory.org/michael-malloy/>

CHAPTER 3

PREPARATION

Strategies for Embracing a New Career Challenge or Retirement with Kimberly A. Skarupski, PhD, MPH

Summary

A graceful exit is the lynchpin of nearly every successful retirement, as we learn in this recorded lecture led by Kimberly Skarupski, PhD, MPH. As host of the Faculty Factory Podcast, Dr. Skarupski's lecture was repackaged into a popular podcast episode for our show.

This broadcast begins with a beautiful quote that holds a lot of significance when talking about retirement and transitions:

“There’s a trick to the ‘graceful exit.’ It begins with the vision to recognize when a job, a life stage, or a relationship is over — and let it go. It means leaving what’s over without denying its validity or its past importance to our lives. It involves a sense of future, a belief that every exit line is an entry, that we are moving up, rather than out.”

— Ellen Goodman (2010), a long-time Washington Post columnist.

In the opening minutes, Dr. Skarupski mentions her desire to have these types of conversations surrounding retirement normalized. No matter

where you are in your career arc or life, these conversations about retirement are for everyone because, believe it or not, “we all will be there soon enough,” she said.

Let’s Talk Identity

Grappling with this identity question is the first challenge many of us will encounter when we start to think about retirement and the next stage of our lives.

- What/who will I be without my identity as a full-time professional academic?
- How will I introduce myself at social events?

Many of us believe that our job titles are our primary identities. And yet, as Dr. Skarupski stresses, we are all so much more than a title at an institution. We all have a multitude of other roles, most commonly starting with:

- Social dimensions: Family member (husband/wife, mom/dad, etc.); community member (volunteer, parishioner, etc.).
- Personal dimensions: Avocations (pickleball player, ballroom dancer, sculptor, etc.).

The Impala Metaphor

Even though an impala can jump 10 feet high and 30 feet in length, a 3-foot fence at the zoo will keep them in place. How is this possible? Because the impala will not jump unless it can see where it’s going.

For many of us, retirement can seem out of reach. You may not be able to imagine doing anything other than working full-time and leaving the career you’ve been dedicated to for decades can be hard to imagine.

“I don’t want to let go because I’m afraid, I’ll fall into nothingness,” might be the subconscious thought running through your mind at this stage. Just like the impala at the zoo. So, what is the solution?

As Dr. Skarupski continues with her metaphor, she suggests “cutting a little peephole in the wall”—learning about the next stage as the best path forward for building courage.

The Paths to Retirement

All of us in academic health can call ourselves “lottery winners,” as this is a privileged career path.

Yet there are many important socioemotional aspects we are not formally trained in, and these are often key to leadership success. These traits will also optimize your next chapter in retirement, as Dr. Skarupski reminds us. That is why education, coaching, and mentorship become so vital for addressing these blind spots.

We are so accustomed to pathways for promotions, but we don’t necessarily have clear pathways for retirement in our field. For example, in the 2017 national survey of medical school faculty affairs deans and leaders conducted by Dr. Skarupski and colleagues, less than half (42%) reported that their institutions even had a retirement policy.*

Therefore, it is imperative that institutions build out seminars and educational programs on this issue. For example, at UTMB, where Dr. Skarupski serves as Vice Provost, this has been built through the Office of Faculty Development.

*(Skarupski KA, Dandar V, Mylona E, Chatterjee A, Welch C, Singh M. Late career faculty: A survey of faculty affairs and faculty development leaders of U.S. medical schools. *Acad Med.* 2020;95(2):234-240.)

Retirement Disrupted

According to the study Merrill Lynch: Work in Retirement 2014 Survey, referenced in this broadcast by Dr. Skarupski, the study identified four phases of retirement:

- Phase 1: Pre-Retirement (the five-year lead-up to actual retirement).
- Phase 2: Career Intermission (a time to “relax, recharge, and retool” away from work, lasting on average 29 months).
- Phase 3: Reengagement (a period marked by a return to work while in retirement, also known as “retirement work”).
- Phase 4: Leisure (a time to permanently stop working).

“It’s very normal these days not to quit cold turkey and go sit on a beach somewhere,” Dr. Skarupski notes.

Other Retirement Food for Thought

Dr. Skarupski also warns us to be aware of stereotypes, prejudices, and discrimination related to ageism and retirement—both towards others and ourselves.

Evidence shows that people often find themselves happiest in retirement when responsibilities and pressures of yesteryear finally begin to wane. Want more good news?

Those in academia are well positioned with the right training to embrace the factors that influence psychological well-being in retirement, Dr. Skarupski also mentions.

She encourages listeners to challenge themselves. What if you reframe your thinking from “What do I want from life?” to “What is life asking of me?” This shift can help you derive purpose and meaning, grounded in your values.

Dr. Skarupski warns, you risk leading a life devoid of meaning and purpose if what you are doing is not aligned with your values. This can also lead to burnout at any stage of life.

Time changes us, so it's crucial to regularly reexamine our values. This presentation concludes with a beautiful quote attributed to Viktor Frankl:

“Human beings’ primary motive is not for money or even happiness, but for meaning. We are driven above all to understand the purpose of our lives.”

Key takeaways summarized from this podcast:

- A successful retirement includes making a graceful exit, which involves recognizing when to let go of certain life stages or roles without denying their importance.
- Identifying as more than just a job title or career role, such as through social or personal dimensions, is vital for a fulfilling transition into retirement.
- Education, coaching, and institutional support are essential to prepare for retirement, especially since formal pathways for retiring are often lacking in academic health.
- Retirement consists of multiple phases, including pre-retirement, a period of re-engagement, and leisure, with peak performance and purpose often occurring in this stage of life when responsibilities decrease.

Listen to the full interview here: <https://facultyfactory.org/embracing-change/>

You can see the accompanying slide deck to this conversation here: <https://facultyfactory.org/wp-content/uploads/2025/06/SLIDES-Optimizing-your-next-chapter.pdf>

Succession Planning in Faculty Development and Academic Affairs with Kimberly A. Skarupski, PhD, MPH

Summary

In the early days of the Faculty Factory Podcast, host Kimberly A. Skarupski, PhD, MPH, would simply flip the microphone on and talk directly to the listeners without a guest. We affectionately referred to these segments as “Fac Chats.” In our 24th Faculty Factory episode, released way back in the summer of 2019, Dr. Skarupski dropped a solo gem for us about succession planning in faculty development and academic affairs.

As outlined, succession planning is a topic that everyone should be thinking about. You don’t have to be on the verge of retirement to start planning for it. The cold, hard fact is that when you leave, things will shift, others will be impacted, and you’ll realize you are replaceable. We all are.

Why Succession Plan?

When done right, succession planning solidifies the continuity of academic programs and institutional knowledge long after you step down. Finding and preparing future leaders is necessary to increase the chances of a smooth transition of responsibilities.

You’ve helped build a culture, and succession planning will help ensure that your hard work is not undone.

Effective succession planning supports the development of emerging leaders who are waiting for their turn to embrace more formal titles of leadership (although it is important to note what we often emphasize in this podcast: all of us are leaders in academic health, regardless of titles).

Johns Hopkins School of Medicine Succession Planning

The podcast opens with Dr. Skarupski discussing how Janice E. Clements, PhD, Johns Hopkins School of Medicine’s Vice Dean for Faculty at the time of the recording, became increasingly vocal about:

- The organization's growing complexity.
- Impending retirements of senior staff.
- The impact that increasing complexity and impending retirements would have on faculty and the broader culture.

At the time, several medical school leaders and staff were nearing retirement, which further sparked conversations about how best to prepare the next generation of leaders.

Dr. Skarupski notes that active involvement in leadership programs is one way to identify potential successors and cultivate future leaders. These programs include leadership training for women, early-career faculty, and other development initiatives.

Ideas for Securing a Future of Bright and Future Leaders

Dr. Skarupski encourages inviting leadership training program alumni to deliver seminars, workshops, and mentoring sessions for other faculty, students, or trainees. Additionally, faculty with expertise in areas like mindfulness, scientific writing, finance, or wellness can offer courses or seminars on these topics.

For example, Neda Gould, PhD, a faculty member at Hopkins trained in mindfulness-based stress reduction (MBSR), integrated these teachings into institutional offerings for other faculty. This was even financially supported as a small portion of her salary was allocated to deliver seminars and workshops on MBSR.

Dr. Skarupski also emphasizes the importance of creating opportunities at your institution for advanced-career or retiring faculty to mentor younger colleagues. This vital aspect of succession planning should be happening continuously, regardless of where folks are in their career journey.

She also highlights the importance of formalizing these initiatives—by creating structured programs, offering financial incentives, and identifying dedicated personnel to oversee faculty engagement in leadership development activities.

As Dr. Skarupski begins to wrap up the podcast, she once again acknowledges that, like many programming efforts in academic health, resource limitations pose challenges. Like anything worth doing, these types of programs require:

- Time.
- Resources.
- Careful planning.

These are important barriers to acknowledge, especially since many faculty members are already stretched thin. Despite these hurdles, the overarching message remains clear: proactive planning, mentorship, and institutional support are essential for ensuring leadership continuity, knowledge transfer, and sustained growth.

Succession planning is a crucial, multifaceted process that involves identifying emerging leaders, providing targeted development opportunities, encouraging faculty-led initiatives, and establishing formal support programs. Doing so helps safeguard institutional knowledge and ensures a resilient leadership pipeline that guides faculty culture through major transitions.

Key takeaways summarized from this podcast:

- Succession planning, when done right, ensures continuity of programs and institutional knowledge. It protects hard work from being undone when leaders retire.
- Involving faculty in leadership programs and mentoring is vital for cultivating the next generation of leaders and preparing them for future responsibilities.
- Creating structured programs and encouraging advanced-career faculty to mentor early-career colleagues are important for sustainable leadership development.
- Proactive planning and faculty involvement are critical for leadership continuity, knowledge transfer, and institutional resilience.

Listen to the full interview here: <https://facultyfactory.org/succession-planning/>

Setting a Plan for the Healthiest Possible Retirement from Academic Health with Donna Vogel, MD, PhD

Summary

The Faculty Factory Podcast thrives in providing timeless advice for faculty, thanks to contributions from people like Donna Vogel, MD, PhD.

As part of her incredible career, she served as Director of the Professional Development Office at Johns Hopkins Medicine. She is also a past president of the American Society of Andrology, with her term concluding in 2013.

As a former Program Director of the Reproductive Medicine grant portfolio at the National Institutes of Health (NIH), she brings a unique perspective to our show from many different angles.

In case you aren't convinced of her brilliance, she is also a former *Jeopardy!* champion, having won four consecutive days and reached the semifinals of the Tournament of Champions.

In her ninth appearance on the show, which took place in September 2025, Dr. Vogel joined us to candidly discuss her journey toward recognizing it was time to retire.

Once the decision was made that retirement was indeed in the cards, she aimed to optimize this next stage of her life to achieve the healthiest possible retirement from a physical, mental, and financial standpoint.

A Poster Child for a Healthy Retirement

She enthusiastically and confidently refers to herself as a “poster child” for what a healthy retirement can look like. It's a notion that, like so many other important things in our line of work, starts with self-awareness and that old familiar friend, EQ.

As someone who identifies as an “off-the-charts J” on the Myers-Briggs questionnaire, Dr. Vogel applied her trademark “careful planning” approach to retirement.

When she was 57, she landed her dream job at Johns Hopkins and, deep down, she knew she would not be doing it for long (maybe six to ten years, she thought at the time). It turned out to be eight.

The deciding factor in her retirement was not age; it was the commute. She took public transit and was able, for a time, to get work done on the train. Once she couldn't stay awake on the train rides home, she figured that wasn't good for her brain and that it might be time to start "hanging it up." Once those feelings set in, it took about a year until she retired.

The Brain in Retirement

In the *New York Times* article Dr. Vogel mentioned, "What Happens to Your Brain When You Retire?" by Mohana Ravindranath, research is cited that points to a decline in verbal memory and mood during retirement.

To counter this, and foster growth in those functions, it is important to make a plan in advance. That plan should include:

- Finding a sense of purpose (often through volunteering).
- Making more social connections.
- Trying new things.

When it comes to trying new things, Dr. Vogel notes that activities she already enjoys, like gardening, are not strictly "new"; however, in retirement, being able to devote extra time to them is a new experience. You can also try something completely different—this could be as simple as a painting class. All of these efforts, according to the article, help preserve brain health.

"The things I enjoy now in retirement are the things I enjoyed in lesser doses or had to put aside when I was working full time," Dr. Vogel says, citing how she records audiobooks as a voice-over artist, along with her fitness commitments and piano lessons.

Not sure where to start when it comes to activities you want to explore in retirement? Ask yourself: "What did you do as a child that you really enjoyed?" This tends to be a strong starting point.

The Four Pillars

The four pillars of retirement, according to Dr. Vogel and discussed toward the end of the podcast, are:

- Financial planning.
- Health and general fitness.
- Things you do for yourself.
- Things you do for others.

When it comes to financial planning, it is akin to writing the methods section of a research paper: while it requires some decision-making, it does not demand “deep, wrenching decision-making,” and it follows a logical process — you gather data and make plans around things like your savings and investments.

Your health and general fitness should be comprehensive and include cardiovascular, strength, and bone health as well as mental health. Preventive care in mental health is particularly important in this pillar, according to Dr. Vogel.

Things you do for yourself can include friends, family, faith, new or renewed activities, and, for animal lovers, time spent with pets.

Things you do for others (such as volunteering and paid work) are also crucial, as they relate to being part of a community. You can deploy your expertise (which we all have in ample amounts in this profession) in meaningful ways. Decide how much you want to stay involved, and whether you will stay in the same field or change.

“Above all, keep learning in retirement, as that overlaps with all four pillars and ties them all together. Never stop learning,” Dr. Vogel tells us in the closing moments of the interview.

Key takeaways summarized from this podcast:

- Try new things in retirement while taking advantage of the opportunity to “fall back in love” with pursuits you once enjoyed deeply but ran out of time for when you were working full-time. Not sure where or how to fill your time? Reflect on what made you happy as a child and go from there.
- Social connections, finding purpose, and being part of a community are not only important for having fun; research has pointed to their role in helping to preserve brain health during retirement.
- Always be aware of the four pillars of retirement and prioritize all four of these aspects as you pursue the healthiest retirement possible.
- Never, ever stop learning.

Listen to the full interview here: <https://facultyfactory.org/vogel-on-retirement/>

Self-Determination Theory with Jeffrey M. Lyness, MD, FACPpsych

Summary:

Self-Determination Theory is described by our friend and guest, Jeffrey M. Lyness, MD, FACPpsych, as a comprehensive theory of human motivation with many practical implications for faculty members. This includes those aspiring for leadership positions and, of course, those heading toward retirement.

At the time of the recording, Dr. Lyness was serving as Senior Associate Dean for Academic Affairs and Professor of Psychiatry and Neurology in the University of Rochester School of Medicine and Dentistry.

The interview was inspired by the peer-reviewed manuscript that Dr. Lyness co-authored about the theory. It was published in BMC Medical Education and called "Engaging students and faculty: implications of self-determination theory for teachers and leaders in academic health."

Self-determination is not something Dr. Lyness or his colleagues invented, rather what they tried to do was summarize its implications in academic health.

What is Self-Determination Theory?

In essence, Self-Determination Theory is an attempt by social scientists to create a comprehensive theory of human motivation. This boils down to the fact that we all want to try to do as much as possible to engage our intrinsic motivation.

There are key ways we can go about engaging that intrinsic motivation, which actually allows us to have more fun while also being more productive. The theory's three basic principles are:

- sense of autonomy,
- sense of competence,
- sense of relatedness.

Sense of autonomy really could be called "sense of choice" as we all like to do things because we choose to do them.

"It doesn't necessarily mean doing it by ourselves. We might choose to do it with other people, but we like to do things because we choose to do them. So this principle is all about that sense of choice," Dr. Lyness explained.

Sense of competence is pretty straightforward too, and it gets to the fact that we all like to do things that we think we're good at. For the things that we don't feel we're good at, we get frustrated and we either try to master it, in which case then we can feel good about it, or we kind of give up and go on to something else that we think we can do well.

And the third key is sense of relatedness. It basically means people like to do things that connect them to other people, to larger ideas, principles, institutions, or movements that they care about.

"We want to do as much as possible to engage our intrinsic motivations," he said.

Dr. Lyness noted that when all three needs (autonomy, competence, and relatedness) are met, people are put in the best position to thrive. And of course, the inverse is also true. Faculty who retire without addressing these three needs are at high risk for all the hallmarks of burnout in this stage of life (depression, loss of identity, etc.).

Key takeaways from this interview:

- Self-determination theory is a framework for understanding human motivation
- Engaging intrinsic motivation relies on three core pillars: autonomy, competence, and relatedness.
- Applying the principles of self-determination theory can effectively promote wellness and reduce burnout among faculty members who are in retirement (or headed there soon).

Listen to the full interview here: <https://facultyfactory.org/self-determination-theory-in-academic-medicine/>

Strategic Retirement and Transitions for Academic Health Leaders with David Niesel, PhD

Summary:

When David W. Niesel, PhD, brought his energy and candor to the Faculty Factory Podcast while discussing his retirement, the main message was simple: retirement is not something you should do on a whim.

Retirement takes disciplined planning with several components to think through. These include:

- Where do you want to retire?
- What do you want to do when you retire?
- Who are you in retirement, and do you actually know how to be happy outside of your career?

That last one hits hard. Over the course of his career, Dr. Niesel rose through the ranks of academic leadership, serving as Vice Dean for the Graduate School of Biomedical Sciences, department chair, dean, and ultimately as Chief Research Officer at the University of Texas Medical Branch (UTMB).

He retired from full-time employment in 2021 and continues as an adjunct professor. He also co-hosts Medical Discovery News, a weekly radio show and podcast, and publishes a weekly newspaper column.

“Not everybody is ready for retirement at the same time,” Dr. Niesel said, “and that question of readiness sits at the heart of this conversation.”

A sense that retirement is coming hits people at different times. It may sneak up on you; as a result, Dr. Niesel points out that you should start planning now for what you want to do with the rest of your life.

"I'm a firm believer in having an idea of what you want to do. Just because you're retired doesn't mean there's nothing to do. In fact, it's quite the opposite," Dr. Niesel says.

Another point Dr. Niesel illustrates in this interview is that everything is subject to change in retirement. Whatever makes you happy will shift, and new opportunities will arise. That's part of the joy and serendipity of retirement itself.

"You will end up changing what you're doing and I think that's healthy. You want to be open to that. The bottom line is you want to do what makes you happy," he said.

Doing what makes you happy has been Dr. Niesel's true north in retirement.

Communicating a Big Decision

Since Dr. Niesel announced his retirement a year in advance, he was able to spend ample time finishing open initiatives that were under his watch. He cared deeply about them and made sure they would not languish after he left.

"It was important to give my bosses, the provost and the president, a heads up that I was thinking about retirement, and I told them about a year before I was going to retire and asked that it be kept confidential," he said.

His retirement brought fresh leadership perspectives to his institution, and this is something that was important to Dr. Niesel.

"It's good for transitions in leadership to occur. It brings in new people with new ideas, and that contributes to the organization's success. Making way for new people to take over and bring in those new ideas to keep the organization strong and really moving forward," he added.

The skills built over a career in research or medicine don't expire at retirement. Academics have a well-developed skill set including problem-solving, critical thinking, and collaboration skills which are universally in demand.

Communities, businesses, and organizations actively seek them out. The real challenge in retirement—as Dr. Niesel points out—often isn't finding something meaningful to do; it's narrowing down the options.

Dr. Niesel's Three Retirement "Don'ts"

1. **Don't assume travel alone is enough.** Constant travel burns you out fast; you need purpose beyond seeing the national parks. "Everybody I've talked to has travel in mind for retirement and travel is fun, but too much travel is not so much fun. And people burn out. So you have to plan for something beyond just travel," he noted.
2. **Don't hover over your successor.** Giving unsolicited advice or quietly influencing former reports undermines the new leader and the transition.
3. **Don't underestimate the adjustment.** Losing the "speed-of-light" pace of academic life is disorienting, so give yourself time, grace, and patience to shift gears.

Many faculty stay quiet about retirement plans, fearing they'll be written off early or lose influence once colleagues know they're on their way out. Part of our goal in having these conversations on the Faculty Factory is to normalize the discussion.

Dr. Niesel demonstrates an impressive knack for treating retirement planning as routine as onboarding, and that, of course, is not something to avoid until the last minute.

Key takeaways from this interview:

- Plan retirement deliberately: decide who you want to be and embrace its twists and turns.
- Start preparing early so you can wrap up commitments you care about well in advance.
- Stay open to change; retirement activities and priorities will evolve and that is a good thing.
- Avoid pitfalls like nonstop travel, hovering over successors, and underestimating the magnitude of this transition/adjustment.

Listen to the full interview here: <https://facultyfactory.org/david-niesel/>

Identity Formation: Beyond the Job Title in Academic Health with Angela Sharkey, MD

Summary

When Angela Sharkey, MD, began to think about stepping away from full-time work, she thought about how the decision would impact her "identity." Grappling with this is tricky since in our field we tend to put so much weight on identity, and introduce ourselves by leading with:

- Name.
- Title.
- Institution.

It's common for this habit to extend to social situations away from work too. It might be written off by some as a trivial concern, but when we retire, we take a major step away from all that. In Dr. Sharkey's third appearance on the Faculty Factory Podcast, the conversation centered on identity formation considerations in the lead-up to retirement.

A Professor Emeritus of Pediatrics at Wake Forest University School of Medicine, Dr. Sharkey retired in 2025 following a multi-decade career in academic health that featured leadership roles across four academic institutions.

Purpose, Passion, and People

In the context of strategic career planning, Dr. Sharkey always taught others to begin by understanding the "3 P's" of purpose, passion, and people. Naturally, she began building a plan for what to do with her time in retirement by ensuring her purpose, passion, and the people around her were front and center.

As she prepared for the journey, Dr. Sharkey realized that her professional identity and work were always connected to an academic institution. Next, she got brutally honest with herself and began exploring how her ego was tied up in that connection.

"I realized I was pretty ego driven and I needed to be able to acknowledge that it was my ego that was driving that need to be connected to an institution. And perhaps a little humility on my part might help me be able to separate in retirement and have it be okay to just be Angela Sharkey," she said in the opening moments of the discussion.

Tuesday at 10:30 Never Goes Away

Dr. Sharkey encourages those looking to start the process of building an identity away from work to apply their passions and skills within their own community and identify what fills their own cup. Starting there is key, because although many retirees can count on a lot of fun and fulfilling travel in their near future, they will never be traveling 365 days out of the year, and eventually they're going to run into a "Tuesday at 10:30."

"Every Tuesday at 10:30 isn't going to be full of excitement. So, what are you going to do that makes you feel like you are fulfilling your purpose in this wonderful phase of life we call retirement?" she said.

When it comes to outlining one's passions and purpose, she encourages folks to regularly take time to reflect on these matters, at least every three years at the longest (ideally annually) and identify where they still derive their greatest joy.

In addition, those planning to retire should remain open to opportunities, especially when someone in their network approaches them, as that person may see a talent in them that they themselves have not yet identified. At the very least, they can take the opportunity on and later decide about whether to continue or step away.

"I explored how I could impact my community in a positive way. And where might I want to integrate myself in an intentional and purposeful way, to fulfill what I perceive to be my purpose and my passions," she said.

Along with exploring how she could apply her skills to improve her own community, she began making time for regular trips to the gym.

Other Considerations and Tips

In the closing moments of the interview, Dr. Sharkey warns listeners to be aware of a trap that many people fall into when they decide to return to their institution on a "part time" basis.

"People who go back to work part time often end up working way more than that, and what ends up happening is the compensation and benefits get dropped, but your workload does not," she said.

With the psychological hurdle that can come with losing an identity in retirement, there's another impending change that comes with its fair share of anxious feelings as the retirement reality sets in: not receiving a paycheck every two weeks or so like clockwork.

In addition to careful financial planning for retirement, Dr. Sharkey gained confidence through simple expense tracking leading up to her retirement.

"What gave me comfort was tracking my spending each month for six months to say, okay, now, if I amortize that over a year, how much am I spending each year?" she said.

As Dr. Sharkey noted, stepping away from a demanding schedule creates flexibility that can bring immediate physical benefits, such as improved sleep and lower anxiety, and staying socially active can directly combat the health risks associated with isolation in later life. The importance of remaining social cannot be overstated.

"Not working does not mean you're not living. It might simply mean that your opportunity to live well has been enhanced," she said.

Key takeaways summarized from this podcast:

- Dr. Sharkey built her retirement plan around the "3 P's," of purpose, passion, and people while mapping out how she would spend her time. She also got honest about how much her ego was tied to her institutional connection.
- Travel and big trips won't fill every day, so retirees need something ongoing, like community involvement, social interactions, hobbies, or exercise, to sustain a sense of purpose in the quieter, ordinary times.
- Returning to an institution "part time" can be a hazard, since compensation often drops while workload doesn't.
- Tracking monthly spending as retirement approaches helps mitigate the emotional adjustment of no longer receiving a regular paycheck.

Listen to the full interview here: <https://facultyfactory.org/identity-formation/>

CHAPTER 4

ACTION

Considerations for Life After Full-Time Employment in Academic Health with Lawrence Appel, MD, MPH

Summary

At the time of this interview's recording, Lawrence Appel, MD, MPH, had roughly 700 peer-reviewed publications. With that level of academic success, a scientific approach tends to overflow into nearly every applicable endeavor in life.

For Dr. Appel, preparing for retirement and finding meaning in the “next chapter” of his life came with the same meticulous examination he has shown throughout his prolific career in academic health.

When this interview originally aired, Dr. Appel was the C. David Molina, MD, MPH, Professor of Medicine at the Johns Hopkins School of Medicine and Director of the Welch Center for Prevention, Epidemiology, and Clinical Research.

When he sat down with us for this interview, Dr. Appel had about two years left before retirement. He gave listeners a glimpse into the work behind delegating the many responsibilities that come with a transition from such a high-ranking position.

Planning for life after full-time retirement is an integrated process for many people, including Dr. Appel. From the earliest stages, he

coordinated his retirement plans with his spouse, including using spreadsheets that outlined the responsibilities impacted by his transition.

Throughout the opening moments of the conversation, we learn about the importance of understanding your primary concerns heading into retirement.

He began thinking about delegating his responsibilities and the timing involved in winding down those activities. This led him to create a spreadsheet that organized everything into a manageable process, ensuring a smooth transition away from his commitments.

The Social Factors Cannot Be Neglected

A successful retirement can be defined in many ways, but, according to Dr. Appel, you must account for the social consequences of the transition. Academic health careers are built on collaboration and social interaction, so maintaining those connections in retirement was paramount for Dr. Appel's planning.

"With retirement planning you are tapering your work down, but in a lot of ways with this change you are also tapering up," Dr. Appel said.

Important Final Thoughts from Dr. Appel

Dr. Appel encourages people whose identities or entire social lives are tied to work to lean into interests and hobbies they had before immersing themselves in their careers. Whether reading, staying physically active, or playing a musical instrument, his advice is to reconnect with those outside interests, and explore something new.

Sometimes success in this stage of life is as simple as planning how you will engage with the relationships and activities that will keep you happy in retirement.

Dr. Appel's interview also reminds listeners that choosing where to live in retirement requires careful thought and planning. It is common to downsize your home and move closer to meaningful relationships or to locations better suited for your hobbies and interests.

Furthermore, the idea that “nobody is indispensable” should ease anxieties about who will fill a lot of the specific roles you will be leaving behind. As Dr. Appel notes, people can cover for you when you’re on vacation; succession planning just applies that principle more permanently.

Although spreadsheets for retirement planning can become complex, Dr. Appel kept his simple. They gave him a clear picture of timelines and roles to consider when tapering out full-time academic work. The key number on the spreadsheet was 70 because he was determined to be retired by that age.

In the podcast’s closing moments, Dr. Appel gave us a favorite quote of his from E. B. White: “I arise in the morning torn between a desire to improve (or save) the world and a desire to enjoy (or savor) the world. This makes it hard to plan the day.”

Key takeaways summarized from this podcast:

- Dr. Appel applied a scientific, spreadsheet-driven approach to retirement, organizing timelines, roles, and a firm target age for full retirement.
- Preparing to delegate responsibilities from high-ranking roles is key. Succession planning makes transitions manageable because “nobody is indispensable.”
- Maintaining and rebuilding social connections was a priority for Dr. Appel; retirees should “taper up” relationships to fill the workplace community void.
- Reconnecting with pre-career hobbies and interests (reading, music, physical activity) helps replace work-centered identity and sustain well-being.

Listen to the full interview here: <https://facultyfactory.org/retirement-considerations/>

Ideas for Advanced-Career and Retiring Faculty with Kimberly A. Skarupski, PhD, MPH

Summary

In another “Fac Chat” solo episode with Kimberly A. Skarupski, PhD, MPH, we learn about some terrific ideas to meet the needs of advanced-career and retired faculty. If your institution has not yet ventured into thoroughly examining the needs of advanced-career and newly retired faculty, this is a podcast episode you may want to listen to on repeat.

There are suggestions and ideas within this podcast that could take years of planning to implement, while others could be enacted tomorrow.

Among these ideas is “The Academy”, which serves as a landing spot for newly retired faculty on the medical campus of Johns Hopkins School of Medicine (The medical campus includes Johns Hopkins Hospital, the School of Nursing, and the Bloomberg School of Public Health). Any faculty member who retires from the medical campus is eligible to join The Academy.

The resource-intensive Academy consists of beautifully renovated physical space and staff. While it may not be feasible for every institution, the idea itself is a shining example of how to serve the needs of retired faculty beyond the basics.

The initiative originated from the genius of Paul Rothman, MD. He served as Dean of Johns Hopkins University School of Medicine and CEO of Johns Hopkins Medicine and is also featured prominently in a separate portion of this book. Dr. Rothman assembled a taskforce focused on better understanding the needs of advanced-career and soon-to-be-retired faculty members. The group met for about a year and then produced a report with three key recommendations, which were subsequently presented to Dr. Rothman. This report resulted in:

- Exploring an early retirement incentive program.
- The Academy – physical space created in the Welch medical library.
- Developing programming efforts, mainly through the Office of Faculty Development.

Early Retirement Incentive

After the taskforce's report was released, Hopkins decided to explore an early retirement incentive plan, which involved considerable efforts and coordination with the institution's budget and finance teams. Despite these challenges, there was a strong desire to get it done. The result was a proposal developed to help faculty members chart a path toward early retirement. "This was a major lift for us," Dr. Skarupski said.

The Academy

The Academy exemplifies how an institution can harness the incredible intellectual capital of retired faculty. It benefits everyone involved—retirees, the institution, and the academic community—by providing meaningful engagement during retirement.

Dr. Skarupski mentions the literature on this topic emphasizes the importance of staying active in purposeful ways during retirement, making such initiatives both valuable for the retired faculty and the institution.

The actual Academy itself required infrastructure and major dedicated resources, including staff and a renovated space in the Welch Medical Library.

The space provided faculty with a venue for meetings, conferences, and activities such as:

- Maintaining connections with trainees.
- Assisting with grant writing and paper reviews.
- Mentorship and coaching.

[For more about The Academy, see "Knowing When to Shape the Next Phase of an Academic Medicine Career with Carol Ziminski, MD"]

Programming Efforts

The final taskforce recommendation was about programming needs. Most programming was coordinated through the Office of Faculty Development, which Dr. Skarupski, a gerontologist with a deep affinity

for working with older populations, values highly.

Initially, programming included a panel discussion featuring recently retired faculty and those contemplating retirement. This provided a valuable opportunity for participants to learn from each other.

Additionally, a four-part series called *The Next Chapter* was launched, consisting of four, two-hour interactive small group sessions. At each of the sessions, participants engaged in self-reflection and facilitated conversations about various retirement transition aspects.

These gatherings also emphasize a strong social element. As Dr. Skarupski stressed, creating a relaxed, informal environment with food helped foster a better overall learning environment for exploring these topics.

Faculty Decisions and the Role of Support

In the closing moments, Dr. Skarupski reminds us that faculty members do not make the decision to retire alone, it is almost always a collaborative process involving partners and family members.

Taking a systems approach to retirement means that institutions seeking to develop relevant programming must recognize that this decision is not made in isolation.

“We wanted to convey that retirement has changed. There’s no longer an abrupt end to a career; rather, it’s a transition that evolves. It may involve subtle shifts in direction based on health and other priorities; that is a common thread,” Dr. Skarupski explains.

Key takeaways summarized from this podcast:

- Institutions should thoroughly and formally examine the needs of advanced-career and newly retired faculty.
- The Academy serves as a model for supporting retired faculty beyond basic engagement, creating a true win-win for both retired faculty and the institution.
- Launching programs and educational seminars for those approaching retirement can be very valuable to faculty and can be implemented swiftly.
- Institutions should acknowledge that retirement decisions are collaborative and involve partners and family to ensure smooth transitions.

Listen to the full interview here: <https://facultyfactory.org/late-career-and-retiring-faculty/>

Why Faculty Should Build a Preferment Portfolio with Darrell G. Kirch, MD

Summary

For those who have devoted their careers to the calling of academic health, transitioning to life after full-time faculty work without losing your identity can be an immense challenge.

In his second appearance on the Faculty Factory Podcast, Darrell G. Kirch, MD, returns to deliver a passionate interview on how to curate a preferment portfolio. As Dr. Kirch describes, this is a balanced mix of passions, pursuits, and other projects that ignite our enthusiasm and end up “securing our identities.”

Dr. Kirch served as the President and CEO of the Association of American Medical Colleges (AAMC) from 2006 to 2019. He is an educator, biomedical scientist, clinical neuroscientist, clinician, and psychiatrist.

As the end of a full-time career in academic health approaches, many of us begin to think about retirement with some anxiety.

“Who will I become without this full-time work and title?” many wonder. The antidote to that anxious line of thinking is a preferment mindset, and the process of cultivating it can begin at any stage of your career.

Rather than viewing retirement solely as an endgame, consider curating a preferment portfolio. As Dr. Kirch explains, retirement should be a time to focus on the things you prefer to do and to trim away less gratifying and tedious activities.

The portfolio approach borrows from a traditional retirement investment portfolio, but instead of stocks and bonds, Dr. Kirch emphasizes constructing it from the activities you plan to pursue in retirement. Furthermore, building a preferment portfolio should involve the same careful due diligence you would devote to an investment portfolio.

And just like an investment portfolio, you do not have to be near retirement to begin thinking about it and planning. You can start early by reflecting on the aspects of your academic life that have brought you the most joy and fulfillment.

How can you eventually integrate the activities that energize you into a future beyond a traditional full-time faculty role? Instead of trying to optimize your portfolio for financial return, aim to diversify the activities you undertake to “yield” you the most satisfaction.

Dr. Kirch’s Sample Portfolio

To help listeners begin planning their own preferment portfolio, Dr. Kirch shares a rough outline of his approach, which includes the following activities:

- Nonprofit work for causes he is passionate about.
- Advisory work for a handful of leaders in academic health.
- Adjunct faculty work.
- Collaborations with an academic health consulting group, where he is brought in on an ad hoc basis to work on projects he finds interesting.

“I have this wonderful (preferment) portfolio that yields tremendous gratification and leaves me plenty of time for another category of my portfolio—enjoying my home in the Colorado Rockies, fly-fishing, hiking, etc.,” Dr. Kirch said.

His approach to building a preferment portfolio is rooted in a career-long effort to avoid burnout.

As Dr. Kirch points out, burnout is a serious risk factor for faculty, and it requires discipline to avoid. For him, that included planning vacations roughly a year in advance and safeguarding his future time off as “sacred.”

This approach could help future-proof your priorities, creating a life protected from burnout, and help you enter what could be the best phase of your life—where every day is spent optimizing for satisfaction and happiness. As he describes, “Even within the most demanding leadership roles, planning ahead allows you to protect your time off.”

It’s not uncommon for individuals to struggle with defining an identity beyond their CV. The demands of working as a faculty member can overshadow many other aspects of life.

The good news for those facing this challenge, which often coexists with burnout, is that devoting time and energy to building your preferment portfolio may be the answer—and you can start today.

Key takeaways summarized from this podcast:

- Transitioning from full-time work in academic health can challenge personal identity; cultivating a preferment portfolio can help maintain fulfillment and purpose.
- The preferment portfolio is a strategic mix of passions and pursuits, planned with the same care as financial investments and aimed at enhancing satisfaction in retirement.
- Early planning and reflection on joyful activities during your career can help you start building a meaningful preferment portfolio today.
- Building a preferment portfolio can combat burnout, preserve identity, and help you build a truly rewarding phase of life in retirement.

Listen to the full interview here: <https://facultyfactory.org/darrell-kirch/>

Transformational Changes, Transition Theory, and Making Graceful Exits with Peter Densen, MD

Summary

We take a deep dive into career transitions and transition theory with Peter Densen, MD.

His appointment as Emeritus Professor of Internal Medicine, Infectious Diseases at the University of Iowa Health Care follows a distinguished 40-year career, including prominent roles such as Associate Dean for Student Affairs and Curriculum, Interim Head of the Department of Internal Medicine, and Executive Associate Dean of the College.

He has a strong knack for mentoring faculty and overseeing all aspects of professional development, including coaching and career transitions.

As we've alluded to several times in this book, within an academic health career, there may be no greater transition than entering retirement. Dr. Densen shares important insights into transformational changes and how to make graceful exits in pursuit of new opportunities.

How It All Started

When Dr. Densen began scaling back his full-time faculty duties and moved to part-time work, he received a book on transitions as an early retirement gift. This thoughtful present sparked his interest in transition literature and in studying transition theory.

"It got me interested, and I started going down the transition rabbit hole, exploring what's known about transitions in the literature," he told us.

Transition theory and its framework guided him as a coach when assisting students, trainees, and colleagues through career transitions.

In a transformational transition, like retirement, it's the person who is changing. In smaller transitions, it might just be the environment that is shifting. A transformational change often involves cognitive, emotional, psychosocial, and behavioral adjustments. That's what makes these transitions so complex and fascinating to Dr. Densen.

Transformational changes are typically marked by three phases:

- An ending.
- A period of uncertainty.
- A new beginning.

The Challenge of a Transformational Change

Dr. Densen became further interested in transition theory while working with young students making the jump to medical school from undergraduate studies. Although all of them were qualified to be there, he noticed that many were struggling with self-doubt. Perhaps this was a common sign of impostor syndrome, but it also reflected that part of their struggle was the transition itself.

If you find yourself struggling with self-doubt after a transformational transition, it's important to remember that this may be a natural part of undergoing such change. It's quite common.

When it comes to a transformational change, the process typically involves three phases, as previously mentioned. It begins with “an ending,” and it may be important to celebrate that ending—even if you are reluctant to do so—because it's not just about you. Others around you may also want to acknowledge and celebrate that closure.

[For example, maybe you don't want to have a retirement party, but others around you may have been impacted deeply by you and they may really want to celebrate you.]

During the next phase, which is a period of uncertainty, it's not uncommon to realize that a change is necessary because “what got you here won't get you there.” It's important to recognize that different people experience this period of uncertainty in various ways, and no two paths to a successful transition are identical.

If there is no desire to change during this period, we might encounter the Peter Principle, which suggests that people are often promoted based on their success in previous roles until they reach a level where they are no longer competent.

While the consequences of this can be severe from a management and organizational perspective, there are also potential downsides to your happiness in retirement if you remain stuck in a state of uncertainty while perpetually resistant to change.

When "I Could Never Do That" Gets in the Way

A related form of resistance can emerge when faculty look at someone else's retirement and think, "I could never do that." Just as early career faculty sometimes dismiss a leadership opportunity because it doesn't match their assumptions of what that role must look like, faculty approaching retirement can fall into the same trap when sizing up what retirement looks like for others.

Seeing a colleague volunteer extensively, travel constantly, or dive into a second career and assuming that path is the only template, or that it simply "isn't for you," can create an unnecessary barrier.

The truth is that retirement, like any leadership role, doesn't have to replicate what someone else has done with it. It can be shaped around your strengths and interests, and your vision for what comes next.

Resistance to change, including a reluctance to leave the comfortable routine of a working career, can itself become a reason to keep working long past the point that serves you best.

Recognizing that resistance for what it is, a natural but surmountable part of the transition, is the first step toward building a successful/happy retirement.

If you are willing to make the necessary changes, you can create a fulfilling retirement journey.

Key takeaways summarized from this podcast:

- Transformational transitions involve significant changes in the individual, often requiring cognitive, emotional, psychosocial, and behavioral adjustments, and typically occur in three phases: an ending, period of uncertainty, and a new beginning.
- Understanding transition theory can help you navigate the emotional and psychological challenges of transitions like retirement.
- Celebrating endings is an important part of the transition process, as it provides closure and recognition of the change, not only for the individual but also for those around you.
- Embracing change during periods of uncertainty is crucial.

Listen to the full interview here: <https://facultyfactory.org/peter-densen/>

CHAPTER 5 MAINTENANCE

The Definitive Guide to a Fulfilling Retirement Journey with Oscar W. “Skip” Brown, MD

Summary

In building a fulfilling retirement, Oscar W. “Skip” Brown, MD, doesn’t hold back when it comes to discussing the severe consequences of frivolously letting the windfall of time on your hands slip away.

“You’ve got to have a plan for what you’re going to do with yourself with all the time you’re about to create. And it is very bad for you—emphasized as such, with giant capital letters—to just have time,” Dr. Brown stressed.

As a clinical professor of pediatrics with UTMB in Galveston, Texas, Dr. Brown has an accomplished career that includes serving as the chief medical officer at UTMB. In 2025, he joined the Faculty Factory to reflect on his own journey from advanced-career high achiever to a mission-based retiree with clear-cut purpose.

Succession Planning

As Dr. Brown describes, there comes a time when you are decades into your career, and a feeling creeps in that you can’t possibly keep your career going on a full-time basis much longer.

When those thoughts entered his mind, they prompted him to begin succession planning, which he describes as the process of identifying future leaders from the next generation. It starts by finding individuals who are willing to take on administrative duties and leadership roles—positions that, as he bluntly puts it, may not offer much recognition or reward.

He developed a timeline and plan to support the people he worked with in moving up and taking on the roles and responsibilities he would leave behind during his transition.

“As you begin the process of identifying those people, you realize you shouldn’t — and often can’t — be in that position or role forever. It’s time to start shepherding the successor along and then get out of the way,” he added.

People often cling to their roles because they associate their identities with them, and, as Dr. Brown notes, that is a huge mistake. He has seen former colleagues trapped by this tendency: they no longer enjoy what they are doing, even though they would enjoy other pursuits.

Finding a “Hobby of the Month”

Fully investing your energy into learning new things is something Dr. Brown loves and recommends. As his own kids put it, he has a “hobby of the month” situation.

Pursuing new challenges and hobbies will also help ease any shocks to your system as you transition away from the routine of going into the workplace every day.

“You have to have a mirror conversation. I’m keenly aware, having observed it in older colleagues and family, that you can’t go from 100 miles per hour to zero and survive. This sudden change will take a toll on your physical and mental health,” said Dr. Brown, referring to studies that indicate the harms of not finding significant interests and ways to engage yourself after ending full-time employment.

Dr. Brown started a simple list of what he wanted to achieve with the windfall of time. He believes you need to have something “on deck” waiting for you to challenge you and occupy your time before you retire.

Some of these activities for Dr. Brown include:

- Shortwave and ham radio hobbies, obtaining related FCC certification and license.
- Deeper involvement in the Roman Catholic Church as a Lay Dominican.
- Volunteer work as a camp physician.

In the closing moments of the podcast, Dr. Brown reminds us that retirement is an adventure that is sometimes difficult to navigate. It encourages listeners to embrace what made you successful in your career as you enter this new season of life and always explore things that make you happy.

Key takeaways summarized from this podcast:

- You cannot go from "100 miles per hour to zero" and expect to thrive. Without proper planning, this sudden change can take a toll on your physical and mental health.
- Create a list of new challenges and hobbies you want to pursue—things that will make you happy—before you actually retire.
- It is a mistake to associate your professional roles with your identity and cling to that for far too long; this approach will ultimately leave you feeling unhappy and could lead to burnout.

Listen to the full interview here: <https://facultyfactory.org/skip-brown/>

New Roles, Change, and Post-Traumatic Growth with Wendy Ward, PhD, ABPP, FAPA, FNAP

Summary

The wonderful and inspiring Wendy Ward, PhD, ABPP, FAPA, FNAP, of the University of Arkansas for Medical Sciences (UAMS), has recorded a record 11 episodes of the Faculty Factory Podcast! Her contributions to our show and its overall growth over the years have been invaluable since her first appearance in June 2020. She is a passionate faculty development advocate and voice.

In this interview, we learn how post-traumatic growth workshops—based on relevant literature and her Faculty Development work, along with resources from the Center for Faculty Excellence at UAMS—overlaps with and strongly supports faculty with building the mental resilience and emotional wellness needed to navigate a life-altering transition like retirement.

In August 2022, she joined our show to discuss all of this with her energy and enthusiasm on full display talking about new roles, change, and helping all faculty achieve more heading into a new endeavor.

The Center for Faculty Excellence

At UAMS, The Center for Faculty Excellence has a mission to support faculty across the many different phases of the faculty lifecycle—from recruitment to retirement, and everything in between.

The Center for Faculty Excellence (CFE) supports UAMS faculty across the full faculty life cycle by integrating onboarding, professional skill development, professionalism, leadership development, mentoring, individual professional wellness, healthy team functioning, growth-oriented wellness culture, recognition, and career advancement into a coordinated institutional resource.

Its work includes introduction sessions, the Faculty Excellence Seminar Series, the Interprofessional Mentoring Program, executive coaching, mediation support, team skill building, the Academic Leadership Circle for Chairs' Development, the Executive Healthcare Leadership Institute, promotion and tenure guidance, annual review support, community-

building programs, and resources for faculty at early-, mid-, advanced-, and emeritus/retirement-transition stages.

Through this broad portfolio, CFE advances faculty engagement, retention, professional growth, leadership capacity, and career success while aligning faculty support with institutional priorities and continuous improvement.

Retiring Faculty

The programming focused on retiring faculty is provided in partnership with the UAMS Emeriti Society and includes a seminar series, a retirement guidebook from human resources, and a confidential mentoring program pairing faculty pre-retirement with those post-retirement.

The seminar series covers professional identity transitioning, health insurance options, Medicare, Social Security, 403b/401k processes, phased retirement planning, and estate planning. It brings in guest speakers to present on each of these topics in a conversational, interactive way.

“We intentionally added programming for late-career faculty. It makes us more accessible and supportive to faculty regardless of where they are at in the career life cycle,” she said.

Faculty needs change over the life cycle and the CFE intends to provide resources and programs that support each and every stage.

Supporting one another from a wellness perspective is also a recurring theme throughout this interview and it is especially important for faculty members approaching retirement. During a life transition as significant as retirement, changes in feelings of identity and purpose will persist along with a drastically different daily routine.

The need to embrace mental health strategies may never be more critical. Learning from what the wellbeing and retirement literature can teach us should help ensure a smoother transition and ultimately foster greater contentment in retirement.

Post-Traumatic Growth and Professional Wellbeing

Dr. Ward also discusses the value of high-impact workshops she has been conducting on post-traumatic growth and wellbeing as they are an invaluable resource for faculty.

When this interview first aired, we were just emerging from the global pandemic—an experience that left many people filled with trauma.

As discussed, the following are important elements of growth following a post-traumatic experience as detailed in the literature:

- Recognizing new possibilities or opportunities that may not have been considered before the traumatic experience.
- Reexamining priorities, values, and purpose, including a clearer sense of what matters most.
- Developing a greater appreciation for life, including gratitude for ordinary moments, relationships, and personal meaning.
- Deepening relationships with others, including greater compassion, openness, empathy, and closeness.
- Recognizing personal strength, including increased confidence in one's ability to cope with future challenges.
- Experiencing spiritual, existential, or worldview change, such as renewed faith, deeper reflection, or a changed understanding of life.

Over the past 10 years the CFE has also offered the “How Busy Professionals Can Maintain Professional Wellness” workshop as well as the “Creating a Team Culture of Wellbeing as a Leader” workshop.

Both workshops incorporate an interactive interprofessional format with brief didactics followed by active learning and application of content to real-world scenarios experienced by participants. Evaluation data supports the utility of these ongoing resources along with the Post-Traumatic Growth workshop to build resilience in individuals and a work culture that supports a state of wellbeing for all.

All the above are certainly applicable to building stronger, more resilient mindsets at any career stage for faculty.

“Better than Baseline”

As Dr. Ward notes, after a prolonged period of reduced work and time to breathe, many people who endured extraordinarily tough times and/or high-paced stressful work environments can return to a healthier rhythm, with renewed energy, perspective, and balance. “Some people, when they have time to breathe and reflect, can come back even better than baseline,” she adds.

For those of us approaching retirement in our field, a period when we can finally take prolonged time to rest and renew (maybe for the first time since college or adolescence) is something to be excited about.

But rest is not the end goal. Rather than signaling an end to contribution, retirement can create space to contribute in new and often more flexible ways—through part-time work, mentoring, volunteering, board service, travel, deepening relationships, continued learning, creativity, and the pursuit of interests that may have been postponed for years.

When emerging from a traditional full-time career in academic health, the hope is that time to rest in retirement will allow us to come back “better than baseline.”

Key takeaways summarized from this podcast:

- The Center for Faculty Excellence at UAMS supports faculty throughout their careers, including focused resources and programs for those approaching retirement, emphasizing continuous self-improvement.
- Key elements of post-traumatic growth: Opening new opportunities, reframing purpose, embracing gratitude, and deepening relationships are essential for resilience at any career stage, including retirement itself.
- Embracing mental health strategies and reflecting on personal growth needs can lead to a smoother transition and greater contentment in retirement.
- Taking time to rest and reflect in retirement could help you become better, stronger and more fulfilled than ever before.

Listen to the full interview here: <https://facultyfactory.org/wendy-ward>

A Blueprint for Staying Active in Retirement from Faculty Life with Vicki Freeman, PhD

Summary

When Vicki Freeman, PhD, joined the Faculty Factory Podcast for an interview about staying productive in retirement and the common challenges associated with stepping down from full-time faculty life, we knew it would be a memorable episode.

She is a professor emeritus and former tenured chair in the University of Texas Medical Branch (UTMB) Department of Clinical Laboratory Sciences. She is also the former Associate Dean for Faculty Development at the School of Health Professions at UTMB.

Advanced Careers in Aging Life Leadership Collaborative

At the UTMB Office of Faculty Affairs, the month-long series called "Advanced Careers in Aging Life Leadership Collaborative" featured Dr. Freeman serving on a panel with recently retired faculty. In this series, she shared her experiences regarding the retirement journey, and the attendees loved it.

This success sparked the idea of having her join the podcast for an introspective look at how she decided to retire at the age of 70.

A new challenge arose with COVID hitting right around this time; however, she knew deep down that it was time for her to step aside and that her department was in a good position to support this change.

"It was time to let the younger generation take leadership roles, and I had worked hard with the department to mentor many faculty members into roles that I felt they could fulfill," she told us.

Phased Retirement

With logistical complications stemming from COVID making it difficult for her to walk away completely, she figured a phased retirement might be the best move forward. This consisted of Dr. Freeman:

- Reducing her work to 75%.
- Stepping down from her position as chair.
- Moving from her department's headquarters in Galveston to the New Braunfels area (a four-hour drive away to be closer to family).
- During this time, she continued to engage in faculty development and teach online, which, because it was during COVID, was "nothing out of the ordinary."

The Magic Age of 70

Unlike several other lines of work, there is no mandatory retirement age in academic health. As long as one has their mental and physical health intact, they can theoretically just keep going. As discussed, this is the temptation many face, and many people have a hard time grappling with what exact age might be best to ride off into the sunset.

For Dr. Freeman, the number was set at 70, and that stayed consistent; it just “felt like a good number for some reason,” and she stuck with it.

She also didn’t want to hold anyone back from the leadership positions she held, as there were people in her institution who had been mentored, and they were prepared to embrace those roles.

Succession Planning

When it comes to succession planning, Dr. Freeman looks for people's strengths and then works backwards from there to think about what roles they are best suited to fill.

“I look for someone who could fit into the position and who could grow into it,” she said.

There will, of course, be challenges with succession planning, as Dr. Freeman notes, but in the long run, her approach has worked out, and she has faith that similar approaches will also succeed.

As a leader heading into retirement, Dr. Freeman stresses that you must be self-aware about ensuring you are giving others the opportunities to step up to the plate and take on new leadership positions.

After the Phased Retirement

After roughly two years of her “phased retirement,” Dr. Freeman jokes that people say, “I did not retire correctly.” This is evidenced by the heavy workload she embraced in the early days of her actual retirement.

This included:

- Chairing a national board of certification for clinical laboratory professionals (at the time of the recording, she had six months left as chair and a year to go after that as past chair in the position).
- Writing textbooks and study guides.
- Engaging in faculty development (not just at UTMB but with faculty at other institutions).
- Serving as an advisor on a professional R&D committee.

She stayed involved in an advisory role within a lot of the work she started during her full-time employment.

For example, one of her major goals while working full time was to get the Doctorate in Clinical Laboratory Science (DCLS) program started, which she accomplished at UTMB.

Now, she stayed involved as an advisor by working to ensure it would become nationally accredited. As a result, it was the first accredited DCLS program in the country.

Other activities that keep her professionally active include working with DCLS students on clinical rotations in Kenya (as well as mission teams from her church). She also remains involved with students by giving a yearly lecture that she is invited back to present.

“That’s why people say I didn’t retire right,” she joked.

Outside of professional pursuits, she applies the research skills she developed at UTMB by involving herself in the hobby of genealogy.

Staying Active in a New Community

Another key aspect that led her to retirement was a desire to move across the state of Texas to be closer to extended family. It is common for newly retired folks to relocate to be closer to family, and as she discusses in the interview, it cannot be overstated how important it is to make efforts to build a new network if you find yourself new to an area in retirement.

Dr. Freeman credits her involvement in her church as a way to build community.

“If you move to a new area, you’re going to have to learn how to build new connections,” she said.

She also built new connections by starting a gardening group focused on native landscaping at her church, which led to her involvement with local chapters of the Native Plant Society of Texas.

Another word of caution for those moving to be closer to family: it is important to set your expectations properly regarding how much you will actually be seeing them. For example, Dr. Freeman cherishes the opportunity to visit her grandchildren during holidays and other special occasions, such as recitals. However, on a day-to-day basis, they are in the midst of busy lives and aren’t always available.

“You can’t count on your family being your entire support network; you are going to need to build more of a community,” she said.

Ultimately, her decision to retire was influenced by family considerations and the challenges posed by the COVID-19 pandemic. She sees retirement not as an endpoint but as an opportunity to pivot toward rest and other meaningful activities. It also provides a nice way to avoid some of the workplace politics she is no longer obligated to navigate.

“I’m just not interested in putting up with the politics anymore,” she told us. “When the politics start getting involved, I know it’s time to check out.”

Key takeaways summarized from this podcast:

- Dr. Freeman chose a phased retirement, reducing her workload and stepping down from her leadership position while remaining engaged in faculty development and teaching online.
- Many people have a hard time grappling with what exact age might be best to retire in academic health. She chose age 70 and stuck with it.
- She highlights the importance of succession planning, focusing on faculty strengths and mentoring the next generation to take on leadership roles, which helps ensure a smooth transition.
- After relocating closer to family, Dr. Freeman emphasizes the significance of building a new support network and community ties (having family in the area may not be enough).
- Dr. Freeman views retirement as a new chapter rather than an endpoint, allowing her to focus on personal interests, family connections, and dodge workplace politics she no longer wishes to navigate.

Listen to the full interview here: <https://facultyfactory.org/vicki-freeman/>

Purposeful Connectedness in Academic Health with Cary C. Ward, MD

Summary:

There have been many memorable interviews in the Faculty Factory's rich podcast history on the innumerable benefits of networking. Taking that a step further is the concept of "purposeful connectedness," as outlined by our friend Cary C. Ward, MD.

Dr. Ward serves as Associate Dean for Faculty Development at Duke University School of Medicine in North Carolina.

Purposeful connectedness is like a cousin to networking, but it goes a step deeper. It's a bit more intimate and deliberate, and it will serve you well throughout your retirement (and the many years leading up to it).

The Art of a "Non-Linear Career"

Dr. Ward opens the discussion with a riff about her career being "all over the place" and not fitting the five- or ten-year plan mold.

"Whenever I talk to faculty about faculty development, I always start with the idea that my career trajectory has been very nonlinear," she told us.

This is a strong point to be mindful of within retirement: the idea that the next chapter doesn't have to be linear, and that pivoting into something unplanned (like she has done throughout her career) can be very rewarding.

A New Job Every Ten Years

Dr. Ward said that a mentor once advised her that "you have to do something new every ten years," and it stuck with her.

Reinvention can keep things fresh. It should always be part of your plans, whether that means shifting the way you approach a new discipline in retirement like teaching, mentoring, consulting, volunteering, or finding a new fulfilling hobby/pursuit altogether.

Since the loss of "hallway serendipity" is a very real retirement problem, it will take more effort to find the purposeful connectedness that can be so fulfilling once you leave your institution.

That effort needs to be intentional, and you'll have to be a little more creative in retirement to find that community, but the effort will be worth it.

Key takeaways from this interview:

- A nonlinear path isn't a bad thing on its own; it's often the most fulfilling way forward.
- Always think about ways to reinvent yourself and try something new. Allow yourself to be vulnerable while embracing change.
- Purposeful connectedness doesn't happen automatically. It has to be practiced intentionally, and that is especially true in retirement

Listen to the full interview here: <https://facultyfactory.org/cary-ward/>

CHAPTER 6

RETIREMENT “POD POTPOURRI”

The Inward Journey of Leadership with Wiley “Chip” Souba, MD

Summary:

Wiley "Chip" Souba, MD, takes us through the inward journey of leadership philosophy and how to extract the wisdom from it that will best benefit faculty at the different stages of their careers in this memorable interview from 2022.

At the time of this interview, Dr. Souba served as a Professor of Surgery at the Geisel School of Medicine at Dartmouth College in Hanover, NH.

The Inward Journey Defined

It's called the inward journey of leadership because it involves self-reflection and exploring who you are. It's a journey because it's a lifelong endeavor, "a mountain with no top" if you will.

This philosophy extends into retirement, which is a crucial phase of life where you must "lead thyself." The goal of inward leadership is leading yourself so that you can experience more joy and fulfillment. As Dr. Souba mentions, "leading yourself is the prerequisite to leading others, and the best leaders are in touch with themselves."

This entails taking a stand on your values, because you can only stand firm when you have something solid beneath you.

"The best leaders must be committed to a future that's bigger than their own agenda."

An Identity Beyond a CV

There was a time when Dr. Souba identified himself with his CV, a common issue that retirees run into when they struggle with losing that identity. What helped shift things for Dr. Souba was the discovery that leadership isn't about you. It's about the organization, and about taking a stand for other people.

If you don't have any guiding principles, life can become a "free for all," and that makes going into retirement with values top of mind all the more important.

As Dr. Souba mentions, "Values create constraints." Most people think freedom means doing anything you want, but real freedom is about having the freedom to act within the constraints of what you value. It is critical to invest the time in exploring and identifying your values ahead of time.

Part of that self-knowledge is also knowing when to lighten up. He emphasized the value of not taking yourself too seriously. "As you go through life, it's very helpful to have a loose relationship, even a detached relationship, with this thing called me," Dr. Souba said.

The Bottom Line

This inward journey leadership mindset is a strong philosophy to carry into retirement. The grit and tenacity, and even some ego, that helped you get the most out of your career can, if left unchecked, become the very thing that makes this next chapter difficult.

Holding on to identity too tightly is a trap that all faculty must strive to avoid at every stage of their career and this is especially true in retirement.

Key takeaways from this interview:

- Leading yourself is the prerequisite to leading others.
- Your values are the foundation that allows you to take a stand when it matters.
- Identity tied too tightly to your CV or role can become a liability, especially in retirement.
- Real freedom comes from acting within the constraints of what you value.
- The inward journey has no finish line; it is a lifelong endeavor that extends well beyond your career.

Listen to the full interview here: <https://facultyfactory.org/chip-souba/>

Taking Ownership of our Wellness with David A. Rogers, MD, MHPE

Summary:

With his experience as Chief Wellness Officer and the ProAssurance Endowed Chair for Physician Wellness in the School of Medicine at the University of Alabama at Birmingham (UAB), Dr. Rogers was the ideal guest to welcome back in early 2022 as we emerged from the pandemic.

His conversation on wellness is full of applicable wisdom for those entering the retirement season of life and those prepping for it.

Giving Others a Fresh Perspective

"I'm as famous as I ever care to be, and so I can devote my energy to advancing others," Dr. Rogers said as he opened this interview talking about his transition from accumulating influence to distributing it.

In 2021, Dr. Rogers stepped down from his role as Associate Dean to focus 100% of his administrative time on wellness. He discusses his reasoning behind that along with many other valuable thoughts on transitions throughout this chat.

"I learned a lot from the faculty affairs community that's been really valuable in this work, but I feel like you really shouldn't be in these [leadership] jobs forever; you need to set for yourself a term. I think it's a good thing to say, I'm going to serve in this role for five years with maybe one renewal, and then I'm going to step out to give other people a fresh perspective and fresh energy," he said.

This approach dovetails and runs parallel with Dr. Rogers' career-long commitment to servant leadership. He finds great meaning in his work by devoting his energy to advancing others.

When it comes to succession planning, Dr. Rogers thinks you must be disciplined about giving people opportunities and then make sure you help develop them through the change. When it comes to farming talent from within, he advises keeping a list.

"Observe and note the people who seem ready and create intentional opportunities rather than waiting for vacancies to open up for them," he added.

Throughout this interview, Dr. Rogers models what it looks like to redefine success. He went from Senior Associate Dean to Chief Wellness Officer, technically a step "down" in title, yet by approaching that transition with a mindset of servant leadership, he stayed incredibly energized and enthused.

His passion for serving others is something you can hear in his voice throughout this interview, and it is undeniably sincere. It's a standard of success we should all be looking to replicate in our transitions to retirement.

Key takeaways from this interview:

- Psychological readiness for retirement might include a shift from accumulating influence to distributing it; Dr. Rogers' mindset of "I'm as famous as I ever care to be" is a healthy benchmark to aim for.
- Setting personal term limits in leadership roles keeps organizations energized with fresh perspectives, and it's a discipline that reflects well on the leader who does it voluntarily.
- Succession planning works best when it's ongoing rather than reactive; keep a running list of people who seem ready, and create opportunities for them before a vacancy forces your hand.

Listen to the full interview here: <https://facultyfactory.org/wellness/>

Building the “Lattice Framework” for Faculty Development with Ann Brown, MD, MHS

Summary:

Ann Brown, MD, MHS, returned to the Faculty Factory Podcast in late 2022 and brought our listeners a powerful lattice metaphor for development and growth applicable to any stage of life.

At the time of the recording, Dr. Brown was Vice Dean for Faculty Emerita at the Duke University School of Medicine, and gradually transitioning to her encore career as a professional coach.

Dr. Brown's passion for helping others reach their potential began with a genuine curiosity about what makes people thrive in academic health, a curiosity that kept expanding over 30 years. And as we learn in this interview, development and growth never stop, certainly not in retirement.

As a blank canvas of time and opportunity, retirement is a unique chance to explore, adjust, and reach new levels of excellence and satisfaction.

Adopting a Coach-like Approach

Dr. Brown encourages listeners to adopt a "coach-like" mindset for navigating different phases of their career and life. This might mean asking yourself probing questions rather than assuming you have the answers.

The coach-like mindset is built on curiosity. In a retirement context, that might mean resisting the urge to be inflexible with your time and instead sitting with questions like:

- What's important to me now?
- Where am I finding fulfillment?
- What am I no longer finding joy in doing?

Recognize your seasons. Dr. Brown emphasizes that nothing is static. Retirement is itself a season, and within it there will be other seasons. The coach-like approach means staying conscious of where you are and where you want to go.

Know your superpowers and your gaps. A coach's mentality means listening more than directing and staying genuinely curious about what comes next. In retirement, that might mean building a community rather than going about things alone.

Priority setting is another important role of a coach. Reflecting on your own priorities through that lens can be a valuable form of self-examination.

Building a Lattice in All Stages of Life

Development in any stage of life can be looked at as a lattice, more than a linear ladder with one direct path pointing upward. A lattice might go off to one side and then off to another, but it will hopefully, eventually rise.

"Part of the job of a faculty member is to be conscious of building that lattice framework as you go through faculty development and coaching conversations, through investing in yourself to build the scaffolding, the lattice," she said.

Key takeaways from this interview:

- Career and personal development are better understood as a lattice than a ladder; progress isn't always linear, but it can still rise over time.
- Adopting a coach-like mindset means leading with curiosity, asking probing questions, and resisting the urge to assume you already have the answers.
- Retirement is not a finish line but a new season with its own opportunities for growth, exploration, and finding the next level of excellence.

Listen to the full interview here: <https://facultyfactory.org/ann-brown/>

Life Lessons in Informal Learning, Mentorship, and On-the-Job Education with David J. Skorton, MD

In early 2025, David J. Skorton, MD, President and CEO of the Association of American Medical Colleges (AAMC), a 150-year-old institution dedicated to improving the health of people everywhere, shared his experiences with long-term learning and mentorship with the Faculty Factory in a discussion we will never forget.

The conversation started with Dr. Skorton's thoughts regarding on-the-job education and the value of maintaining a "continuous learning mindset," based on the concept of the "Beginner's Mind."

He believes these concepts must be front and center throughout every transition one makes in life. His own professional story illustrates this, as he has navigated multiple career shifts that reminded him how much he must learn, at every turn.

Dr. Skorton's Unique Journey

Initially aspiring to be a session musician, Dr. Skorton changed course for several reasons, including his father's insistence on pursuing a college education.

This set him on a trajectory that eventually led to medical school – while maintaining his appreciation for music and the value of incorporating the arts and humanities into all of life's journey, including medical education.

Recalling his first day of residency training at the University of California, Los Angeles, he remembered feeling uncertain about how to treat a particularly complex patient until a nurse guided him on the appropriate care for that patient. He emphasized the importance of learning from all individuals, regardless of their formal titles, telling us, "Mentors come in all shapes and sizes."

"On-the-job learning means a willingness to be humble, to know you don't know everything, and to ask for help and seek guidance from others," he said.

Near-peer mentoring, or leaning on the support of someone who is slightly further along on their journey, is a recurring theme of Dr.

Skorton's accomplished career. He believes this type of support is vital as you enter any new stage of life.

Dr. Skorton was taught early on by a mentor who told him, "Don't be embarrassed to say that you don't know." This lesson resonates with Dr. Skorton to this day.

Dealing with Imposter Syndrome and Employing a Beginner's Mind

Never losing the "beginner's mind," a famous Buddhist concept that heavily influenced Dr. Skorton, is also central to his career arc, and it is surely relevant to someone entering the uncertainty of a new environment such as retirement as well.

Dr. Skorton quoted the monk Shunryu Suzuki, who reportedly said, "In the beginner's mind there are many possibilities, but in the expert's mind there are few."

It boils down to always keeping your humility and being open to change while putting the ego aside.

As a related theme, he discussed the reality of imposter syndrome, which is a common feeling for many. He encouraged people to accept their insecurities and double down on learning from others as the best way to fight imposter syndrome.

"We're human beings. We're not just human doings. And being a human being means that you've got to be open to things around you in every way, whatever that means. Family, friends, the environment, whatever it is," he added.

Dr. Skorton thinks the more we can accept ourselves the way we are, the better chance we will have to get through each stage of life in a peaceful way and enjoy it as much as possible.

In the interview's closing moments, Dr. Skorton reflected on handling difficult decisions as a leader. He advised us all to remain open and adaptable, recognizing that no one leader can possess all the answers.

By valuing collective wisdom and carrying an open mind to learn from everything and anyone, you may just wind up achieving more than was otherwise imaginable. That's great advice for any phase of life, and that certainly includes retirement.

Key takeaways from this interview:

- No matter how accomplished you become, humility and a willingness to ask for help are non-negotiable.
- Maintaining a "beginner's mind" will keep you open to new possibilities and will always keep you growing.
- Imposter syndrome doesn't go away, even at the top. The sooner you accept this, the sooner you can benefit from it by leaning into learning from the people around you.
- Transitions, including retirement, are easier when you stop trying to have all the answers. An open mind might just take you further than any individual expertise can.

Listen to the full interview here: <https://facultyfactory.org/david-skorton/>

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THANK YOU

We appreciate you taking the time to explore this book and join us on this mission of building and sustaining the Faculty Factory community. **Please visit us at FacultyFactory.org to learn more!**

This book's goal is to serve as an unbiased road map for nearly every facet of a major transition and the retirement journey. It is built from the experiences and insights drawn from the Faculty Factory's archive of incredible guest interviews. In this rich anthology, you'll reap the fruit of our colleagues' labor as they have so graciously shared their wisdom on the Faculty Factory Podcast. You'll learn the who, what, when, where, why, and how from faculty leaders across the country who have made transitions.

ABOUT THE FACULTY FACTORY

The mission of the Faculty Factory and its companion website (FacultyFactory.org) is to build and support a community of leaders who share tools, resources, wisdom, and encouragement in service to our faculty members, schools, and institutions.

The Faculty Factory is sponsored by The University of Texas Medical Branch (UTMB), Office of the Provost (Susan Chubinskaya, PhD, MS, Senior Vice President, Provost, and Chief Academic Officer).

