University of Virginia
November 15, 2007

Report on the Response of the University of Virginia
(Agency 2007 – Academic Division)
to the Impact of Virginia’s Population.

Submitted November 15, 2007
Pursuant to legislation enacted by the General Assembly of Virginia, the University of Virginia (Agency 2007 – Academic Division) submits this report of its progress in addressing the impact of the aging of Virginia’s population.

Submitted November 15, 2007

__________________________  Susan A. Carkeek
Vice President for Human Resources and
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November 15, 2007

Executive Summary

HB 110 (Chapter 54, 2006 Session), (http://leg1.state.va.us/cgi-bin/legp504.exe?061+ful+CHAP0054) amended Va. Code §2.2-5510, to require each state agency include in its strategic plan “an analysis of the impact that aging of the population will have on its ability to deliver services and a description of how the agency is responding to these changes.” Further, the bill provides that each state agency “shall report by October 1 of each year to the Governor and to the General Assembly its progress for addressing the impact of the aging of the population in at least five specific actions.” Please note: HB 2097 (Ch. 900, 2003 Session) created the Government Performance and Results Act and set out the requirements for state agencies to participate in a formal strategic planning process. The Department of Planning and Budget has stipulated that institutions of higher education are exempt from those provisions (See http://dpb.virginia.gov/sp/SPInstrux2005.pdf). The University of Virginia participates in a separate strategic planning process. Without waiving the exception specifically granted by DPB, the University of Virginia is submitting the report mandated under HB110 because the University understands the importance of this information to the Commonwealth.

The University of Virginia (Agency 2007 – Academic Division) is a tertiary educational institution primarily providing educational services to students whose ages, for most part, fall below the stated age ranges. However, in accordance with its mission of education, research and public service, the University also provides services of a more limited scope to employees and community members whose ages fall into the 65-older range.

The University of Virginia has a number of focused initiatives aimed at the senior population. Consistent with its mission, the University offers educational, health, public safety, recreational and transportation services to seniors. Information about these services is well-publicized and accessible through web-based technology.

During the spring of 2007, President Casteen launched the Commission on the Future of the University, a group charged with proposing strategic directions for the University over the next decade and beyond. The Commission is operating with four committees: Schools and the Medical Center, Programmatic Initiatives, Faculty and Student Life, and Funding and Other Resources. A final report is scheduled to be presented to the University’s Board of Visitors for consideration in February of 2008.
The strategic initiatives identified by the Commission on the Future of the University and approved by the Board of Visitors will affect the future staffing needs of the University. Workforce planning initiatives will continue to be implemented to ensure the University has the staffing necessary to achieve its mission statement and strategic goals.
Agency Description

University of Virginia’s Statement of Purpose and Goals

**Purpose:** The central purpose of the University of Virginia is to enrich the mind by stimulating and sustaining a spirit of free inquiry directed to understanding the nature of the universe and the role of mankind in it. Activities designed to quicken, discipline, and enlarge the intellectual and creative capacities, as well as the aesthetic and ethical awareness, of the members of the University and to record, preserve, and disseminate the results of intellectual discovery and creative endeavor serve this purpose. In fulfilling it, the University places the highest priority on achieving eminence as a center of higher learning.

**Goals:** The University of Virginia seeks to achieve its central purpose through the pursuit of the following specific goals:

1. To offer instruction of the highest quality to undergraduates from all walks of life, not only by transmitting established knowledge and skills, but by fostering in students the habits of mind and character required to develop a generous receptivity to new ideas, from whatever source; a disposition for applying the most rigorous criticism to all ideas and institutions, whether old or new; an ability to test hypotheses and re-interpret human experience; and a desire to engage in a lifetime of learning.
2. To sustain liberal education as the central intellectual concern of the University, not only in the curricula of the College of Arts and Sciences, but also as a foundation for the professional undergraduate programs.
3. To educate men and women for the professions in certain undergraduate and in graduate programs leading to degrees in the School of Architecture, Business Administration, Commerce, Education, Engineering and Applied Science, Law, Medicine, and Nursing.
4. To lead in the advancement and application of knowledge through graduate study and research and to disseminate the results among scholars and the general public.
5. To attract and retain eminent faculty in order to provide the highest quality of instruction and leadership in research.
6. To seek the ablest and most promising students, within the Commonwealth and without; and, in keeping with the intentions of Thomas Jefferson, to attend to their
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total development and well-being; and to provide appropriate intellectual, athletic, and social programs.

7. To strive for diversity in the student body and in the faculty and to promote international exchange of scholars and students.

8. To provide for students and faculty an atmosphere conducive to fellowship and understanding and to their constructive participation in the affairs of the University and the community at large.

9. To expand educational opportunities for persons with special challenges such as minority status, physical disability, ethnic heritage, or insufficient financial resources.

10. To engage in research in the medical sciences and to provide innovative leadership in health care and medical services in the local community, the Commonwealth, and the nation.

11. To offer to the local community, the Commonwealth of Virginia, and the nation the various kinds of public service and intellectual and cultural activities which are consonant with the purposes of the University.

12. To provide continuing education programs of the highest quality to the Commonwealth and the nation.

13. To cooperate with and assist other colleges, educational institutions, and agencies, especially in the Commonwealth of Virginia, by making available to them the facilities of the University and the experience and counsel of its members so as to contribute to education in the Commonwealth and beyond.

14. To establish new programs, schools, and degrees, and to undertake such research as the needs of the Commonwealth of Virginia and the nation may require.
Data Requested

1. To the extent such data is available, the number of persons who received services from the agency in the past fiscal year who fell into each of the following age ranges: 65-74; 75-84; and 85 and older. If the agency can provide data that compares such numbers of senior citizens served in the past, please do so. If the agency lacks specific information about the numbers of senior citizens it serves, but has other evidence indicating that it is serving more or fewer senior citizens than it has in the past, please describe the basis for that estimation.

Response: U.Va.’s primary focus is to provide undergraduate and graduate instruction to students whose ages, for the most part, fall considerably below the stated age ranges. U.Va.’s fall 2007 total enrollment for credit courses is 24,257. Of students enrolled in credit courses, there are six (6) students on Grounds with ages of 65-74. U.Va. also offers off-Grounds credit courses through its School of Continuing and Professional Studies. Thirteen (13) individuals 65-74, two (2) between 75-84, and one (1) 85 and older are currently enrolled in these courses.

U.Va. also provides a wide variety of educational services to employees, students, alumni, parents of students, local community members, and citizens of the Commonwealth which are not tracked by age (See Response to Question #2). There are numerous individuals throughout the Commonwealth in the 65-older range taking advantage of these offerings.

2. Identify the agency services that are utilized by senior citizens 65 and older in significant numbers. Indicate whether the agency has the capacity at present to serve all interested seniors or whether the demand for certain services exceeds the agency’s capacity. If so, does the agency maintain waiting lists for services?

Response: In keeping with its mission of education, research, and public service, U.Va. does provide services to individuals in the 65-older range. These services are accessible through U.Va.’s home website, http://www.virginia.edu/ and other U.Va. websites such as Things To Do/U.Va. News http://www.virginia.edu/thingstodo/. Services include educational programs and lectures regarding aging and related issues, research on gerontology and geriatrics, and public service assistance such as how to find a physician. U.Va. also provides a wide variety of entertainment venues that are available to all citizens of the Commonwealth including those in the 65-older range. Other websites of these services include:
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Education

U.Va. Institute of Aging (http://www.virginia.edu/aginginstitute/education/) – provides a listing of courses and programs on aging as well as information regarding the availability of funding for aging related courses.

School of Continuing and Professional Studies (http://www.scps.virginia.edu/) – offers a Bachelor of Interdisciplinary Studies program (http://www.scps.virginia.edu/bisdegree/index.htm) as well as other courses of interest to seniors such as Travel and Learn opportunities (http://www.virginia.edu/travelandlearn/).

Tuition Waiver Program (http://www.uvacommunityscholar.info) - School of Continuing & Professional Education: in compliance with the Senior Citizen Education Act, the University offers courses with tuition and certain fees waived for qualified senior citizens. Adequate capacity exists for this program to serve all interested seniors.

Community Scholar Program (http://www.uvacommunityscholar.info) - School of Continuing & Professional Education: non-degree program offered to qualified community members including senior citizens interested in lifelong learning. Adequate capacity exists for this program to serve all interested seniors.

Research

U.Va. Institute of Aging (http://www.virginia.edu/aginginstitute/research/) provides a list of aging research conducted by U.Va.

Several other U.Va. websites list aging-related research activities. They include: School of Medicine (http://www.healthsystem.virginia.edu/internet/som-research/home.cfm), School of Nursing (http://www.nursing.virginia.edu/research/), Center for Transportation Studies (http://cts.virginia.edu/research_areas.php), and the Vice President for Research and Graduate Studies (http://www.virginia.edu/vprgs/for_press.html).

Public Service

Institute on Aging offers Aging 101 (http://www.virginia.edu/aginginstitute/events/) – Institute on Aging-Community lecture series offers public events; reservations are
required for these events, but no interested individual has been turned away the day of the event.

Institute of Aging also offers the Distinguished Speaker Series/External Speaker Series (http://www.virginia.edu/aginginstitute/events/features.html). Speakers in these series are usually well known in the aging field and their topics are relatively broad. These talks are usually advertised not only to University members but also the general public. Adequate capacity exists for this program to serve all interested seniors.

Eldercare Consultation Program (http://www.healthsystem.virginia.edu/internet/feap/eldercare/elder-program-components.cfm) sponsored by the Faculty and Employee Assistance Program provides specific Eldercare Consultation Program for employees of U.Va. Adequate capacity exists for this program to serve all interested seniors.


Claude Moore Health Sciences Library (http://www.healthsystem.virginia.edu/internet/library/admin/dept/outreach.cfm) offers outreach with the goal of developing and promoting health care information and library services to health professionals throughout the state.

The U.Va. Health System through the Office of Telemedicine (http://www.healthsystem.virginia.edu/internet/vatelehealth/) provides linkages between remotely located patients and healthcare professionals throughout the Commonwealth. The Office of Telemedicine also provides the Virginia Telehealth Resource Center (http://www.healthsystem.virginia.edu/internet/vatelehealth/) to foster the use of telehealth and e-health technologies to improve the health of citizens of the Commonwealth.

The Office of Public Service and Outreach (http://www.virginia.edu/provost/pso/) reaches over one million people every year through Outreach Virginia (http://www.virginia.edu/outreachvirginia/). There are currently more than 450 public service and outreach programs. Examples relating to aging include:

Adopt a Grandparent Program (http://scs.student.virginia.edu/~madison/grandparent/index.html) administered through Madison House. This program establishes a special one-to-one relationship
between a U.Va. student and an elderly person living at home or in a local nursing home.

Art Stretchers (http://www.virginia.edu/artmuseum/) offered through the U.Va. Art Museum that conducts an arts enrichment program for seniors; including tours and demonstrations.

Law Student Advocacy for the Elderly (http://www.law.virginia.edu/html/academics/clinics.htm#1) administered by the U.Va. Law School students to assist elderly clients in negotiations, administrative hearings, and court proceedings on a variety of legal matters including wills and powers of attorney, guardianships, consumer issues, Medicaid and Medicare benefits, nursing home regulation and long-term care, elder abuse and neglect, and advance medical directives.

A list of all programs offered through Outreach Virginia may be found at (http://outreachvirginia.org/program/index.php?page=3&program_type[]=3).

Weldon Cooper Center for Public Service (http://www.coopercenter.org/) serves the Commonwealth by providing demographic studies that are used by local and State government to plan future services. The Center's services are listed at (http://www.coopercenter.org/SERVICES/).

U.Va. Office of Community Outreach (http://www.virginia.edu/communityoutreach/) provides outreach services to the Charlottesville-Albemarle community.

Other U.Va. organizations providing service and entertainment to senior citizens include:
- Alderman Library (http://www.lib.virginia.edu/alderman/)
- Athletics Department (http://www.virginia.edu/art/events/)
- Bayly Art Museum (http://www.virginia.edu/artmuseum/)
- Birdwood Golf Course (http://www.boarsheadinn.com/activities/birdwood/)
- Calendars on the Web (http://www.virginia.edu/Calendar/)
- Culbreth and Helms Theatres (http://www.virginia.edu/drama/tickets.htm)
- Exhibitions from the U.Va. Library (http://www.lib.virginia.edu/small/exhibits/)
- Fayerweather Gallery (http://www.virginia.edu/fayerweather/)
- Festival of the Book (http://www.vabook.org/)
- Grounds Tours (http://www.virginia.edu/uvatours/slideshow/)
- Heritage Repertory Theatre (http://www.virginia.edu/heritagerep/boxOffice.htm)
- John Paul Jones Arena (http://www.johnpauljonesarena.com/)
(http://www.astro.virginia.edu/research/observatories/FanMt.php)
3. Identify current agency programs, specifically designed to serve seniors 65 and older, that fall into any of the following six categories: Health Care/Wellness; Education; Public Safety; Recreation; Financial Security (including Housing); and Transportation.

Response:

**Health Care/Wellness:** Besides educating physicians, the School of Medicine also provides medical services to patients in the stated age 65-older ranges. The report for the latter service is incorporated in the separate report submitted by Agency 209, University of Virginia Medical Center.

**Education:** U.Va. Institute of Aging (http://www.virginia.edu/aginginstitute/education/) provides a list of aging-related courses (See Response to Question #2).

Recreation: The University does not offer intramural sports/recreation programs specifically designed for seniors; however, approximately 2% (68 out of 4074) of all recreation memberships are held by retired U.Va. faculty and staff.

Financial Security: U.Va. provides retirement options to faculty (Virginia Retirement plan (VRS) and U.Va. defined contribution plans) and staff (VRS). U.Va. offers several courses through the School of Continuing & Professional Studies on investing, early retirement, and financial security. The School’s website provides a course listing for the School’s Centers that are located throughout the Commonwealth (http://etq07.itc.virginia.edu/ce-cod/servlet/COD).

Transportation: U.Va. Parking and Transportation Department (P&T) offers several options targeted towards 65-older range. P&T provides reserved spaces in many lots for employees 65 and older and can create individualized reserved spaces upon request. The U.Va. Bus Transit Services (http://www.virginia.edu/parking/bus/bus.html) is open to all members of the University and Charlottesville-Albemarle community. Statistics on the numbers of seniors using the service are not tabulated. Senior citizens, however, do take advantage of this service. P&T also offers The University Transportation Service Demand and Respond Transportation Service (UTS DART) that provides transportation to disabled individuals including seniors that are unable to use the regular fixed-route bus service.


4. Identify the extent to which your agency provides “consumer-oriented” publication and websites online that are designed to be “senior-friendly.” If the information you currently provide is not readily accessible to seniors, identify any steps your agency is taking to improve accessibility.

Response: “Consumer-oriented” services provided by U.Va. are accessible online (See the Response for Question #2 for examples). In addition, U.Va. is committed to provide assistive technological resources (http://www.itc.virginia.edu/assistivetech/) regarding both hardware and software for seniors and for others with special needs. In terms of Web accessibility, U.Va. has implemented design, layout, graphical and content standards (http://www.itc.virginia.edu/desktop/web/accessibility/home.html) that are intended to promote accessibility and reduce or eliminate barriers for everyone including the physically disabled and seniors.
5. Describe the effect that the aging of the agency’s own workforce will have on its ability to deliver services. Consider the number of retirements expected in the next two years, the effect these retirements might have (e.g., loss of leadership or institutional knowledge in certain programs), how losses might be replaced (e.g., promotions or transfers, recruitment, use of wage staff, including retirees, re-engineering, outsourcing), and the costs or savings from the replacements (e.g., staff development cost, salary savings). This item might be addressed by summarizing relevant portions of the agency’s workforce plan.

Response: U.Va. continues to address the aging of its workforce.

U.Va. Academic Division Workforce by Age (March 2007)

<table>
<thead>
<tr>
<th>Type of Employee</th>
<th>Age of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(full and part-time salaried employees)</td>
</tr>
<tr>
<td></td>
<td>44 &amp; Under</td>
</tr>
<tr>
<td>Teaching &amp; Research Faculty &amp; Professional Research Staff</td>
<td>969</td>
</tr>
<tr>
<td>Administrative &amp; Professional Faculty</td>
<td>342</td>
</tr>
<tr>
<td>Classified &amp; University Staff</td>
<td>2115</td>
</tr>
<tr>
<td>Total</td>
<td>3426</td>
</tr>
</tbody>
</table>

U.Va.’s Academic Division has 332 full and part-time salaried employees working that are over the age of 65. The number of employees working at U.Va. who are 65 or older is an indication that not all employees retire when they reach the age of 65 or 66.
Reasons given for not retiring include good health, the high cost of individual and family healthcare, and the financial market for those with U.Va.’s defined contribution plans. Analysis of U.Va. retirements covering 2003 to 2006, however, does indicate that the average age for retirements is 65 for Teaching and Research and Professional Research Staff, 64 for Administrative and Professional Faculty, and 60 for Classified and University staff over this time period.

U.Va. has projected retirements over the next 15 years.

U.Va. Academic Division Projected Retirements Over the Next Fifteen Years (March 2007)

<table>
<thead>
<tr>
<th>Type of Employee</th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2022</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching &amp; Research Faculty &amp; Professional Research Staff</td>
<td>227</td>
<td>259</td>
<td>360</td>
<td>368</td>
<td>1214</td>
</tr>
<tr>
<td>Administrative &amp; Professional Faculty</td>
<td>20</td>
<td>68</td>
<td>139</td>
<td>132</td>
<td>359</td>
</tr>
<tr>
<td>Classified &amp; University Staff</td>
<td>85</td>
<td>308</td>
<td>615</td>
<td>743</td>
<td>1751</td>
</tr>
<tr>
<td>Total</td>
<td>332</td>
<td>635</td>
<td>1114</td>
<td>1243</td>
<td>3324</td>
</tr>
</tbody>
</table>
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The projections show the potential impact of retirements on the U.Va.’s Academic Division workforce. U.Va.’s workforce planning efforts continue to address this potential loss of employees. New initiatives are being implemented and developed to ensure that U.Va. has the staffing necessary to meet its mission and goals.

Several new initiatives have been launched to address the lost and potential lose of employees to retirement. New leadership training and development programs have been introduced for faculty department chairs and mid-level classified and university staff. These new programs are teaching the supervisory skills needed to retain current employees and to make better hiring decisions. A new “Essential WorkSkills” program (http://www.hrs.virginia.edu/career/dot/essentials/Essentials.html) has also been implemented for new and current employees in our lower Pay Grades. The “Essential WorkSkills” program is designed to reinforce the U.Va. work ethic and to provide the skills and knowledge needed to succeed in their present jobs and advance to higher level positions.

Two other major initiatives will influence U.Va.’s response to the aging of U.Va.’s workforce. These two initiatives are the Commission on the Future of the University (http://www.virginia.edu/planningdocuments/commission/) and the Higher Education Restructuring Initiative (http://www.virginia.edu/restructuring/). The Commission on the Future of the University is a strategic planning initiative that will provide U.Va.’s future direction. The commission is operating with four major committees: Schools and the Medical Center, Programmatic Initiatives, Faculty and Student Life, and Funding and Other Resources. A final report will be presented by President Casteen to U.Va.’s Board of Visitors for consideration in February, 2008. The new programs and initiatives resulting from the Commission will certainly impact the future staffing needs of U.Va. The human resource component of the Higher Education Restructuring Initiative, when fully implemented, should improve the retention of current staff and enhance U.Va.’s efforts to compete for new workers.

U.Va. will continue to plan to address issues relating to its aging workforce. Strategies such as replacing employees through promotions or transfers, using wage employees including retirees, reengineering, outsourcing, and providing training to enhance the skills and abilities of current staff will be considered in U.Va.’s efforts to maintain appropriate staffing. It is likely, however, that the cost of replacing current staff and implementing new initiatives will not result in cost savings. U.Va. will make every effort to consider cost as it addresses the need to maintain its workforce.

6. Describe any other services or programs that the agency has implemented or plans to implement in the future to address the impact of the aging of Virginia’s population.
Response: While the primary focus of U.Va. is undergraduate and graduate instruction; new services, research, and outreach programs will continue to be introduced to address aging and related issues. All new educational services, research, and outreach programs will be reflected on U.Va.’s websites.