

ADVANCE SPRING 2012 LEADERSHIP SMALL GROUP DISCUSSION SUMMARY

The ADVANCE Center for Institutional Change hosted a leadership workshop for university deans, chairs, and directors on May 23, 2012 entitled, “A Discussion on Models for Faculty Workload Distribution and Merit Reviews.” The workshop engaged approximately 75 participants on discussions about faculty merit review and workload models. At the conclusion of the workshop, participants were asked to consider a best practice or tip regarding faculty merit reviews or faculty workload distribution models that they heard during the workshop and write their feedback on note cards. Each participant provided several responses for the question. Following the workshop, the ADVANCE program compiled all responses and organized them into the document below.

FACULTY WORKLOAD DISTRIBUTION

a. BUYOUTS

- Cool idea: The idea of the first buyout of a course costs x , but the second and later costs more.
- Prohibition of buying out any more than half of one’s teaching
- Limit number of teaching buyouts to a maximum of 50% of expected load

b. BASE WORKLOADS

- Assign a higher base load—easier to go down from huge base load than to go up from lower base
- Increase average teaching load and be generous in release rather than adding courses to increase overall activity of faculty member

c. NEGOTIATING WORKLOAD

- Remarkable Variability—there is not a one size fits all approach
- Get faculty consensus on load to quicken individual negotiations
- Negotiate types of courses (department, faculty, boutique)
- Ask faculty to teach four course and negotiate that one will be a course of faculty member’s choice, one will be a course of the department’s choice, and two will be up for negotiation

d. WEIGHING, SCORING, EVALUATING

- Agree to and publish what “normal load” looks like
- How do we weight research activity versus teaching and arrive at a fair and viable model?
- Guidelines versus points
- The math department’s system of quantifying major dimensions of workload
- Publish what’s expected of a typical faculty member
- Flexibility in applying metrics is crucial
- Point system has some disadvantages—everyone wants points for everything
- “Overload” and then give credit for research
- Implicit incentives can erode collegial buy in for service or more difficult with extra teaching
- Use a spreadsheet to keep track of teaching/service assignments over time—ensure equity over time if not each year

FACULTY MERIT REVIEWS

A. TIMEFRAME

- Merit review: mitigate/adjust an annual score on the basis of two previous years

B. WORKLOAD ADJUSTMENTS

- Apparently some units have an explicit way of recognizing shifting ratios (R,T,S) throughout the faculty member's career

C. WEIGHING, SCORING, EVALUATING

- Challenge in quantifying research and scholarship
- There are published guidelines for nontraditional scholarship
- Individual faculty request for extra merit and then provide evidence
- Two pools: one for absolute merit; one for compression
- How best to review/score merit in very heterogeneous units (e.g. mixture of research and tenure; faculty of many different fields)?
- Form a merit committee to advise chair—be sure to form committee carefully
- Divide “service” into departmental service versus professional service. There are big problems in someone asking for teaching release for editing journals. Teaching helps the whole department. Editing a journal may advantage the individual faculty member unfairly
- I like the idea of using a form (perhaps by CIDR) for the peer reviews
- Consult faculty-wide in making policy
- Committees that follow rubrics for each rank—need to remind people the value of rubrics
- What to do with declining productivity or with someone who doesn't teach well or do good service?

D. RESOURCES

- Can't we catalog all the approaches to merit reviews at UW or most of them? We need more ideas. We only go through about four models (out of eight possible) at our table.
- Rubrics from departments on campus on ADVANCE website—central clearinghouse of info

E. RAISES AND FINANCES

- How do we financially reward research when the state funding stream has shifted to rewarding only teaching via ABB?

F. NON-MERITORIOUS REVIEWS

- Non-meritorious review should be more enforced!
- Don't be shy to rate someone non-meritorious and use it to leverage people who are unproductive to either become active or leave
- Clarification on faculty senate meritorious/non-meritorious decisions this year
If faculty do not provide data two years in a row, they are automatically non-meritorious
- Service needs to be defined at department, university, and national levels. How does each category weigh in?
- Pull all the problem faculty in the UW into one department!