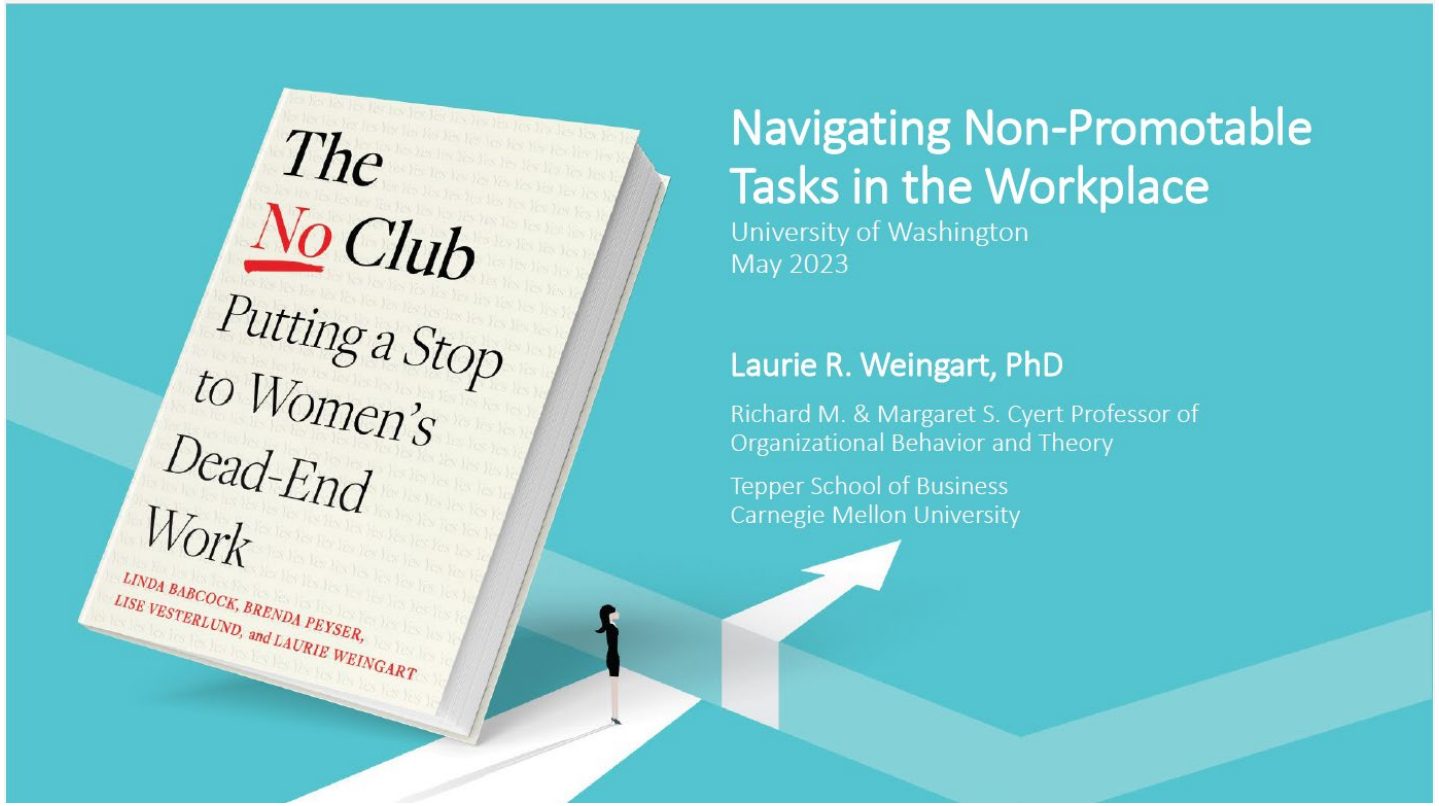
Designing Service Workload Systems to Support Faculty Mentoring, Evaluation, and Promotion

2023-24 ADVANCE Leadership Workshop Series in Conjunction with Opportunities in Leadership Program (OLP)
March 7, 2024

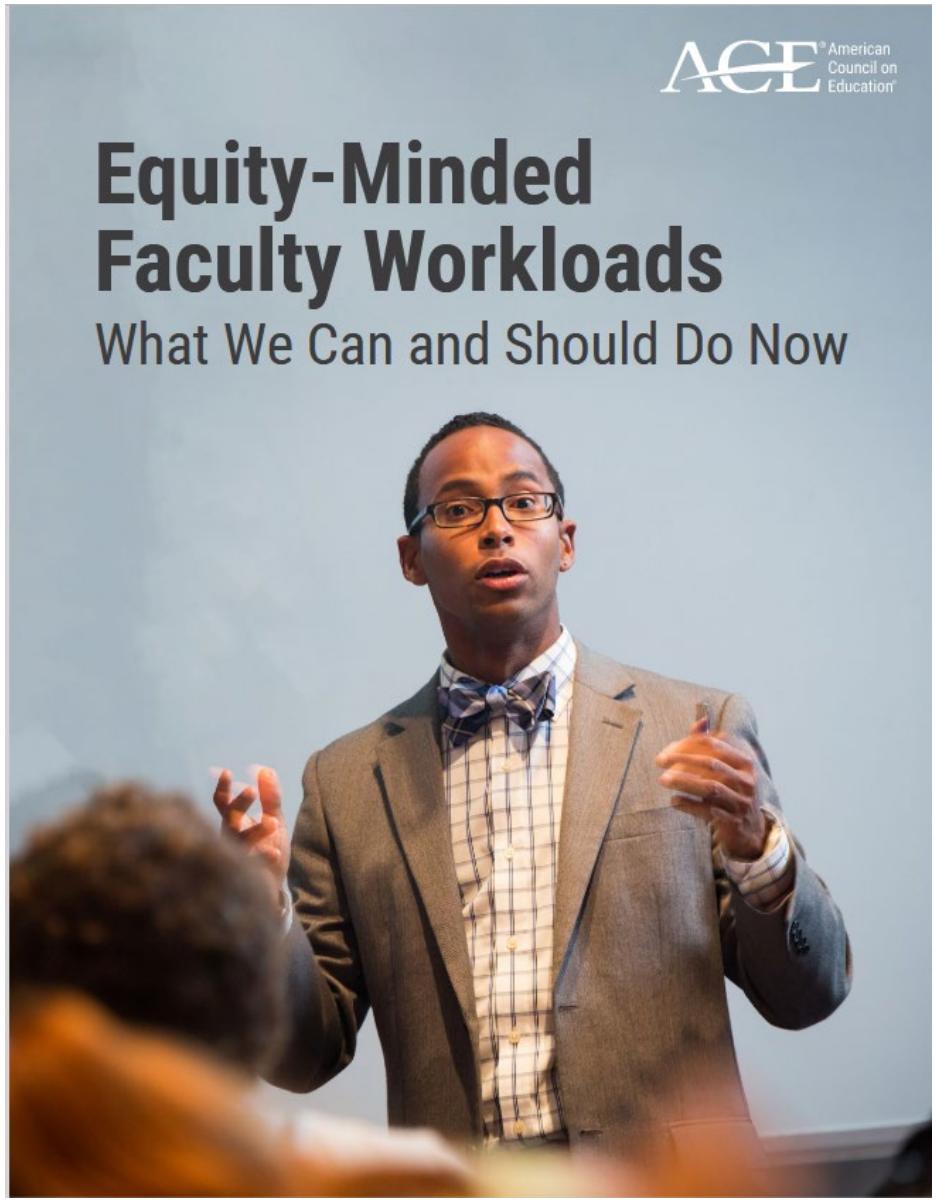
ADVANCE CENTER FOR INSTITUTIONAL CHANGE
UNIVERSITY of WASHINGTON

Why and how faculty workload become inequitable

Strategies for service workload equity



https://www.thenoclub.com/



The Faculty Workload and Rewards Project (University of Maryland)
https://advance.umd.edu/fwrp/home

Agenda

10:00 – 10:10	Welcome and Introductions
10:10 – 11:00	Panel and Discussion
11:00 – 11:45	Small Group Breakouts
11:45 – 12:00	Wrap Up
12:00 – 12:30	Lunch

Panelists

- **Anis Bawarshi**, Chair, Department of English
- **Jennifer Koski**, Associate Dean for Academic and Faculty Affairs, Foster School of Business
- **Kristi Morgansen**, Chair, Department of Aeronautics and Astronautics

Anis Bawarshi

Chair, Department of English

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Structures of Articulation

- Paying attention to sites of articulation
  - Underlying structures that maintain inequities and devalue service. In short, think first about what service is: defining, recognizing, valuing, making legible
- Values and evaluations: English Department Merit heuristic
  - https://english.washington.edu/sites/english/files/documents/merit_review_heuristic.pdf
  - “Service includes a wide range of community creating activities, from departmental, university, and professional committee work to editorial work to administrative service to public engagement and outreach.”
- Merit Review Criteria & Rubric
  - The criteria align with the merit heuristic we encourage faculty to use when writing their annual activity reports and when reviewing merit. The heuristic and rubric are meant to help us be inclusive of and accountable to the range of work we do across teaching/mentoring, research, service, and equity
- Service as institution building

Service and Workload Inequity

- Invisible labor and Service Inequity
- Merit equity guidelines
  - https://english.washington.edu/sites/english/files/documents/equity-oriented_guidelines_for_cas.pdf
  - Name forms of work that are often invisible in academia. Or, if nominally recognized, the scale at which some faculty engage this labor may be disproportionate, may not be sufficiently recognized or compensated, or may be carried out by faculty whose rank does not carry with it expectations for such labor
  - This document can be used as a guide for identifying the various circumstances that lead to faculty work becoming invisible or inequitably distributed

Service and Workload Distribution

- Service equity and distribution (in discussion)
  - + service
  - Spending time generating list of expected/reasonable workload
    - More students, Institution/Department/Leadership, Equity and Justice, Mentorship, “in the form of . . . .”
  - + + + service
    - Some colleagues do barely + service and some do +++ service
    - Those who don’t currently do + service can either take on + service in order to distribute the load or teach an extra class/generate SCHs
    - This can allow us to reduce extra + on some or provide course reduction for those who do +++ service
    - In short, need to compensate for extra service (summer salary, etc)
  - Defining expectations per rank
  - Rest as Service?

Jennifer Koski

Associate Dean for Academic and Faculty Affairs, Foster School of Business

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Overview- Performance Review Process

- Faculty prepare a packet of materials for annual review.
- Outcome of process is a score between 1-9 on each of the components of their duties.
  - e.g. 40% research, 40% service, 20% service for tenured faculty
- We have fairly detailed guidelines for research and teaching.
- How to evaluate service?
  - We had migrated to a model where we classified faculty as “above expectations,” “meets expectations,” or “below average.”
- *What is “meets expectations” for an Associate Teaching Professor or “below average” for a Full Professor?*
  - Especially concerned about equity of service workload distribution and scores.

Service Guidelines

Guidance on Scores

Assistants:	25% Below Average: Merit Score of 5 50% Meets Expectations: Merit Score of 6 25% Exceeds Expectations: Merit Score of 7
Associates:	25% Below Average: Merit Score of 6 50% Meets Expectations: Merit Score of 7.5 25% Exceeds Expectations: Merit Score of 9
Fulls:	25% Below Average: Merit Score of 6 50% Meets Expectations: Merit Score of 7.5 25% Exceeds Expectations: Merit Score of 9

Benchmarking

	Exceeds Expectations
Full	100+ hours
Associate	75+ hours
Assistant	25+ hours

Sample “Meets Expectations”(Associate Professor)

Example 1

- Member, PhD Admissions Committee
- Member, Undergraduate PC
- Member, Undergraduate Scholarship Review Committee

Example 2

- Member, Department Faculty Recruiting Committee
- Member, MBA Curriculum Review Committee
- Presentations to Student and Alumni organizations

Example 3

- Faculty Advisor, Student Clubs
- Member, Specialty Masters’ Curriculum Revision Committee
- Member, Department Chair Search Committee
- Graduation Marshall

Takeaways and Challenges: Service

- Takeaways:
  - Clearly something was needed.
  - But, there are still opportunities for improvement.
- Major challenges: performance review process
  - Tradeoff between measurable and non-measurable factors.
  - Variation in types of activities.
  - Variation in reporting.
- Major challenges: allocation of service
  - Equity.
  - Lack of information.
  - Shirking and Saying No.

ADVANCE Workshop

Designing Service Workload Systems to Support Faculty Mentoring, Evaluation, and Promotion

Professor Kristi A. Morgansen

WILLIAM E. BOEING
DEPARTMENT OF AERONAUTICS & ASTRONAUTICS
UNIVERSITY of WASHINGTON

Role and types of service

College of Engineering P&T Toolkit:

Service is work performed primarily in the role of a representative of the department, College, University, or other professional organization, rather than for the individual credit of the faculty member.

Professional service is:

- Governance of university
  - Department, College, University
- Technical society operation
  - Publication reviews, proposal reviews, conference organization
- General public need
  - Board membership

Professional service is not:

- Consulting for pay
- (Usually not)
  - Volunteering to do forest service trail maintenance
  - volunteering in a soup kitchen
  - volunteering as an EMT

A&A Department Service

All department tasks are assessed for time needs on a periodic basis

Faculty are periodically surveyed on task preferences

- Year 1 faculty (any rank): no department service assigned
  - Expected to engage appropriately in technical society service
- Year 2 Assistant Professor: 1 assignment
  - Year 3-5 Assistant Professor: 2 assignments and possibly 3 by year 5
- Associate Professors: 3-4 assignments
- Professors: 5-6 assignments
- Committee chair role counts as double assignment

Managing NPTs

Department tasks are all tracked

- Capstone team mentoring, student projects associated with courses, RSO advising, etc
- Workloads are established and managed by chair

Opportunities for improvement

- College and university service requests do not always route through the chair first (and/or are never reported to chair)
- Develop standard CV formatting for NPTs – right now some faculty report with exquisite detail, while others do not (consistent data needed)

Small Group Breakout

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Two Thought Exercises

- Explore each exercise individually and then as a group
  - Tuesday's Inbox
  - The Hallway Ask
- Discussion: Observations about your own responses and patterns or differences with your group?
- Delay reading the analysis of these exercises until after group discussion

Report Out

- Observations about your own responses and patterns or differences with your group?

- Insights from Faculty Workload and Rewards Project
  - Workload inequities result from individual discretion and choices AND pattern of who is asked to do what
  - Workload decisions often occur in “unscripted” and “foggy” contexts
  - Workload inequity emerges because lack of underlying strategy for workload decisions

Activity: Audit and Subtract

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Rethinking Committees and Service Workload Equity

Focus on subtraction, not addition:

"[Think of yourself as] sort of an editor in chief. What do great editors do? They cross things out, they make things shorter." – Bob Sutton, Professor of Management Science and Engineering, Stanford (Rethinking podcast with Adam Grant)

- Ex: Faculty Service Audit (#2) and Restructuring and Reducing Committees (#11)
- **Indv: Look at your list of unit-level committees**
  - Identify the **current intensity level** of the committees in your unit (Ex. #11)
    - What do you know? Not know? How can you find out?
  - What is the **appropriate** intensity level, composition, frequency, etc.? How can you make these determinations?
  - What are opportunities for **subtraction**? (e.g., fewer mtgs, remove cmtes, prioritize goals, etc.)
  - What **equitable service workload strategies** can you apply to your unit's committee? (e.g., assignments, roles, accountability, rewards, recognition, audit, etc.)
- **Group: Trouble shoot, share observations and ideas**