

More Than a Zero-Sum Game

Shared Work Agreements

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Consider the following three scenarios:

After a faculty member is appointed on the tenure track, he or she sits down with the department chair and is given a choice between two pathways that lead to tenure: one that emphasizes research and one that emphasizes teaching and the development of new curricular programs. Although some research is required in the teaching model and some teaching in the research model, both are considered equally legitimate and have the same reward: tenure. Both pathways fulfill critical campus missions and strategic goals.

Two recently tenured faculty members who have young children decide to forgo their sabbaticals in lieu of a new contract they negotiate with their institution to go part-time for two years as tenured associate professors.

A dashboard is created that shows the campus service, teaching, and research contributions of all faculty members in a college. Faculty members can easily see what the average, high, and low contributions are and assess how their contributions measure up. A series of organizing practices are then put in place in each department to ensure equity in contributions. The practices include required rotating key campus service roles, using banking systems, and providing rewards for above-average contributions in all three areas via merit pay.

Each of these reforms involves a change in organizational practices to balance faculty and institutional needs and goals. Each requires the faculty member and the institution to compromise on some benefit, norm, or expectation to succeed. Each also goes against the assumption that every faculty member should

be an ideal worker, available to work twenty-four hours a day and excel in every area of work simultaneously. At the same time, such reforms acknowledge the financial constraints and organizational goals of higher education institutions. These reforms assume something more than a zero-sum game—both institutions and individuals can win, as long as they enter into agreements in which there is trust and flexibility.

In this chapter, we consider reform in organizational practices to allow faculty and institutions greater flexibility to achieve individual and institutional goals. Following the model of efforts in industry and government, many colleges have put work-life policies in place to allow faculty members to balance work and family care. In an effort to respond to shifting individual and institutional needs, many universities have created new differentiated workload options. Last but not least, equity-minded institutions have initiated new ways of thinking about faculty workload that ensure greater fairness and acknowledge campus service and teaching contributions, especially in the case of women, people of color, and non-tenure-track faculty members—all of whom may have been burdened with invisible and uncredited institutional housekeeping. Although it is too early to know the long-term benefits of many of these new initiatives, research on such programs implemented in industry (Schawbel 2015) and in higher education (Clegg and Esping 2005; Lester and Sallee 2009) suggests that institutions investing in such programs are likely to benefit from improved recruitment, retention, and morale of faculty; cost savings from not having to replace faculty members; and greater faculty agency and productivity in meeting institutional goals. Such initiatives also take advantage of a hidden resource to achieve faculty and institutional goals: flexibility (O'Meara 2015).

New Work Agreements: Differentiated Workloads, Integrated Teaching-Research Models, and Banking Systems

It is well known that most full-time tenure-track faculty in four-year universities struggle to balance teaching, research, and service roles effectively to earn tenure. Relatedly, institutions struggle to accomplish all parts of their missions well. In fact, Alexander Astin and Mitchell Chang (1995) found that few colleges or universities are able to create a work environment that is highly student-centered, offering rich opportunities for student learning and engagement, and also highly research productive, with faculty publishing prolifically at the top of their fields. In 2002, James Fairweather conducted a study to investigate what percentage of faculty are “simultaneously productive in both teaching and research” (30). The data for his study came from a nationally representative sample of 25,780 full-time and part-time faculty members from 817 institutions

of higher education used in the 1992–93 National Survey of Postsecondary Faculty. Fairweather found that only “22% of all faculty in 4-year institutions simultaneously attained high productivity in teaching and research” (ibid., 43). He defined *high research productivity* as authoring more refereed publications than the median for the field of study and institution and/or serving as the “principal investigator on a funded research project” that was “above the median in both total research dollars and conference presentations” or in the top quartile of funding or number of conference presentations (ibid., 35). In many cases, these two activities of research and teaching alone can seem like a zero-sum game for faculty. Ranking systems like that used by U.S. News & World Report evaluate and reward faculty members for contributions to disciplines (O’Meara and Meekins 2012). Effective teaching also requires significant time and attention but is not recognized in ranking systems or prioritized in many academic reward systems. Faculty often feel pulled in different directions, wanting to do both well, but not having enough time. As a result, few institutions are able to produce teaching and research outcomes even moderately well (Astin and Chang 1995). Those institutions that are able to achieve teaching and research goals have found a way to merge such activities, so that more than one task is being accomplished at a time; or allow different groups of faculty members to make contributions to these missions or contribute to all missions, but at different times in their careers. Given many non-tenure-track faculty members are hired to teach but have PhDs and want to continue to learn and contribute to scholarship as well, the issue of finding ways to balance faculty roles and meet institutional needs affects both the tenure and non-tenure-track faculty (Kezar 2012). In this chapter we provide examples of several institutions that have taken steps to create new, flexible work agreements to balance faculty roles.

Customizing Careers and Equitable Divisions of Labor: The Stanford University School of Medicine Banking System

For many years, scholars have observed that increasing demands by institutions and decreasing staff have resulted in an overloaded plate for full-time tenure-track faculty (Gappa, Austin, and Trice 2007; Rice, Sorcinelli, and Austin 2000; Trower 2012). Working fifty to sixty hours or more per week, and not feeling that they are performing adequately in any one area, can contribute to burnout and stress among faculty members (Kreuter 2013). In addition to juggling their professional and personal lives, faculty members at Stanford University School of Medicine also noted that their careers as medical faculty members required them to balance their teaching, research, and campus service work with clinical care.

The Stanford University School of Medicine created the Academic Biomedical Career Customization (ABCC) program as a solution to problems of flexibility

and control in workload. The program’s creators—Hannah Valentine, senior associate dean for diversity and faculty development, and Christy Sandborg, vice president of medical affairs at Lucile Packard Children’s Hospital—explain that they adapted Deloitte’s Mass Career Customization flexibility model to provide medical school faculty members with the ability to individualize their career trajectory and tempo (Valentine and Sandborg 2013). By customizing their careers, medical faculty members can plan for themselves the type of work they want to take on and the time period in which they intend to complete it. Valentine and Sandborg describe how faculty members work in teams with their department chairs and professional career-life coaches to develop each of the five dimensions of their three-to-five-year plans. These five dimensions are “pace (anticipated time to promotion); workload (disaggregated into clinical, research, teaching, and administration); role as an individual contributor or leader; schedule predictability; and work-life integration” (ibid., 3). These teams reconvene regularly to confirm the plan is still acceptable to the faculty member, make any necessary alterations, and evaluate the individual’s responsibility for it.

In addition, the ABCC program has a time-banking system that allows professors to earn credits for completed work, which they can redeem for assistance with other tasks at work or home. Valentine and Sandborg (2013) explain how this system allows faculty members to take on responsibilities when they can and rewards them with benefits to solve work-life and work-work conflicts when needed. For example, Lauren Rikleen notes “the banking system allows hours spent on mentoring students and participating on committees to be converted into support mechanisms such as grant writing assistance, meal deliveries, and housecleaning” (2013, 1). Lindsey Trimble O’Connor suggests that the system provides professors with flexibility in managing work-life conflicts by offering faculty the opportunity “to accelerate their careers when possible and decelerate when family and personal responsibilities are greatest” (2013, 10).

This system might be especially beneficial to women because, as Jennifer Raymond, an associate professor of neurobiology and associate dean for faculty career flexibility at Stanford University Medical School, notes, “women in academic medicine also experience more work-work conflict than men,” and women faculty members often are responsible for more teaching and service work than their male counterparts—which could be detrimental to their ability to conduct and publish research, typically required for promotion (paraphrased by Trimble O’Connor 2013, 1). The flexibility offered by the time-banking system and career customization model assists faculty members in managing their time and workload. The ABCC program was awarded the Alfred P. Sloan Award for Excellence in Faculty Career Flexibility. Rikleen (2013) reports that initial evaluations of the program are positive, and the intent is to scale it up beyond

its first fifty participants to the rest of the medical school faculty after the conclusion of the second pilot phase.

Flexible Allocation of Talent: Kansas State University

In 1988, several female professors at Kansas State University (KSU) expressed their desire to have “more explicit standards” for evaluating their performance (Clegg and Esping 2005, 167). They were concerned that they and their male counterparts were being evaluated based on different standards and that their potential for promotion and tenure might be negatively affected by the lack of explicit standards. Also, faculty members who were exceptional at teaching were not being rewarded as often or through as clear a process as were faculty members with achievements in research. Responding to these concerns, the university began to develop a new policy in 1990 under which faculty members would meet with their department chair at the beginning of every academic year to develop “individualized agreements” that would both make the best use of each faculty member’s strengths and ensure that department work needs were met (ibid., 177). Rather than stipulate departmental standards for time allotted to research, teaching, and service, the faculty member and the department chair would develop mutually agreed-on performance standards that would be “specific and unique to the individual” and serve as the basis of the individualized assignment (ibid., 170). In other words, every faculty member would meet with his or her department head to set his or her own personal goals and ensure that those goals corresponded to the needs of the department. During these annual meetings, the faculty member and the department chair would also jointly evaluate whether or not the professional goals stipulated during the previous year’s meeting and in the faculty member’s work plan had been met. If the faculty member did not achieve previous goals, he or she and the department chair would together create a plan for remedying any problems (Clegg and Esping 2005). In addition, responding to faculty complaints about the lack of credit for teaching, KSU’s provost and college deans encouraged all departments to review their practices for evaluating teaching and to make the scholarship of teaching an integral component of faculty evaluations. Victoria Clegg and Gretchen Esping (2005) note that KSU established the University Chair for Distinguished Teaching Scholars, which recognized the importance of teaching. The faculty members who were awarded this honor would be appointed to a half-time position for one academic year and would permanently retain the title of University Distinguished Teaching Scholar.

In evaluating the effectiveness of the individual faculty assignments, Clegg and Esping interviewed all college deans, department heads, and the university provost individually during forty-minute taped sessions. In addition, Clegg and

Esping also requested faculty members in all departments to participate in an anonymous online survey (with both close- and open-ended questions). The authors found that “nearly 90 percent of all department evaluation documents [were revised to] mention flexibility in the allocation of time and talent, one way or another,” and a few departments had even amended their evaluation materials so that faculty members could receive credit for research on teaching in their fields (2005, 173). Overall, they found that faculty members were generally supportive of the individualized arrangements. Furthermore, the term *scholarship* had been broadened and was commonly used on campus to include research, teaching, and service components, a change that Clegg and Esping attributed to the campuswide discussions about flexible or individualized work arrangements.

There was a consensus that teaching had come to be viewed with greater appreciation and given more weight as a component of scholarship, but these results were not universal. As of 2005, some departments had not fully embraced the changes or institutionalized them as a permanent part of KSU (Clegg and Esping 2005). The lack of universal implementation, according to Clegg and Esping, was the result of different department members’ degree of buying into the benefits of implementing flexible workload arrangements and of changes in department leadership. However, the program has continued, and the *University Handbook* states: “Institutional excellence is enhanced by both faculty specialization and versatility in the kind of work done within and across departments and units. Faculty members will have individual responsibility profiles. . . . When included as part of a faculty member’s appointment, each of the responsibility areas below is considered in decisions for reappointment, tenure and promotion as well as in annual merit evaluations” (Kansas State University Office of the Provost and Senior Vice President 2015, 1).

Overall, Clegg and Esping (2005) observe that implementation of individualized agreements requires regular, ongoing communication and collaboration between faculty members and departmental administrators. Also, the individualized agreements must be honored in all parts of the faculty members’ reward system, from annual merit reviews to promotion and tenure—as is noted in the *KSU University Handbook*. Some might wonder if individualized agreements emphasizing engaged scholarship or the scholarship of teaching hurt faculty mobility, as this work does not generally bring as much prestige as traditional research does. This could be true, but it is hard to know because there is no national database of faculty members who have left one position for another or felt unable to leave because of the emphasis of their work resulting from such policies. However, given that a relatively small percentage of tenure-track faculty members move from one institution to another, a better question may be whether these policies add to faculty satisfaction and productivity and the ability of the department to meet collective goals.

Ideal, but Not the Ideal Worker: Part-Time Tenure Track and Phased Retirement

Research has shown that both Generation X and millennial academic mothers and fathers are more interested than ever before in balancing work and life goals. Many such faculty members are looking for ways to take specific periods of time away from work, or to work part-time for a period while children are young or other family members need care (Lester and Sallee 2009). Also, as baby boomer faculty members continue to retire, Colleen Flaherty (2013) found that many do not want to leave their posts completely and still have much to give to their institutions, but are left with all-or-nothing options before retirement. Thus, a good number of Gen X and millennial full-time faculty members are looking for careers that are not full time. It is important to note that we did not say they want to teach a class here and there or become adjunct faculty members. Rather, they want to maintain their identity and status as career faculty members—just not serve at a full-time pace. Over the past twenty years, many higher education institutions and state systems have put work-life policies and programs in place to support academic parents who want to switch to part-time status and faculty members looking for phased retirement. Fueled and supported by such catalysts as the National Science Foundation's Increasing the Participation and Advancement of Women in Academic Science and Engineering Careers (ADVANCE) program, Alfred P. Sloan Foundation, American Association of University Professors, and American Council on Education, institutions have implemented part-time tenure-track positions and phased-retirement programs and policies.

In responding to the frequent difficulties that faculty members, especially women early in their careers, have faced in requesting and receiving parental leave, Robert Drago and Joan Williams (2000) proposed the creation of half-time tenure-track positions. They observed:

Raising a child takes 20 years, not one semester. American women, who still do the vast majority of child care, will not achieve equality in academia so long as the ideal academic is defined as someone who takes no time off for child-rearing. . . . It is possible that delayed childbearing could resolve this problem. However, the numbers do not fit this strategy. As of 1995, the mean age for receipt of a PhD was 34, placing the tenure year at age 40. Asking women to delay having children until such a late age seems unfair and unkind, and involves health and infertility risks. Fathers receive no such requests, nor do they face comparable dangers. The tenure clock precludes gender equality in academics, as [Arlie] Hochschild showed 25 years ago. Hochschild suggested that universities permit faculty to work part-time. We go further to argue that the solution is to redefine the ideal worker in academia, by offering

proportional pay, benefits, and advancement for part-time work. This idea boils down to a part-time tenure track. (2000, 47)

A part-time tenure track includes reducing the productivity requirements for faculty members and/or lengthening the time allowed for those working part time to meet stipulated productivity requirements. Today, "there are more than 8,000 individuals working in the United States on PTTT [part-time tenure-track] appointments" (Herbers 2014, 14). In these half-time tenure-track arrangements, the faculty member's tenure clock runs at half speed. In other words, if the faculty member requested half-time status for two years, her or his tenure clock would be extended for one year. The University of California (UC), Berkeley, Family Friendly Edge provides one example of how a half-time tenure-track option could work. This program, which was initially funded by the Alfred P. Sloan Foundation, allows faculty members to sign a memorandum of understanding with the university to change from full-time to part-time status (temporarily or permanently) to accommodate family needs. However, the eight-year limitation of service still applies for assistant professors (University of California 2003). In addition, the UC 2006 "Policy on Appointment and Promotion: Professor Series" notes that "teaching and service expectations for part-time appointees shall be pro-rated in accordance with the percentage of time of the appointment" (n.d.). The policy on research is less clear, but it does indicate that "if an appointee only receives part of a full-time salary, equity demands some effort to arrange an appointment with partial responsibilities" (ibid.). Although the university has made the part-time tenure-track option available to professors since 1985, Mary Ann Mason and Angelica Stacy note that only two professors had taken advantage of it prior to 2003 (n.d.) Joan Herbers offers one possible explanation for that underuse: she argues that a part-time tenure track appears to clash with the cultural norms in academe, according to which "ideal workers do not work part-time" (2014, 14). Likewise, studies of other institutions that have created part-time tenure-track options have found them underused because of fear that an academic on such a track will not be considered serious about his or her career and will lose career momentum and the inability to sustain a 50 percent pay cut, even for a year, because of high cost of living (Lester and Sallee 2009). Although the first barrier can be addressed by trying to create more family friendly campuses, the second is less under institutional control as more families require two salaries to meet costs.

Phased retirement might be viewed as another kind of part-time tenure-track arrangement. As Mary Beckman (2003) notes, many mandatory retirement policies for university faculty were abolished in 1994. Laurie Fendrich explains the consequences of this change: "The average age for all tenured professors nationwide is now approaching 55 and creeping upward; the number

of professors 65 and older more than doubled between 2000 and 2011. In spite of those numbers. . . three-quarters of professors between 49 and 67 say they will either delay retirement past age 65 or—gasp!—never retire at all” (2014). The increasing number of faculty members delaying retirement has affected the diversity of faculty members at many universities. Fendrich cites Cornell University, the University of Virginia, the University of Texas at Austin, Duke University, and the University of North Carolina (UNC) at Chapel Hill as institutions of higher education at which more than 25 percent of faculty members are above the age of sixty. In responding to the change in demographics and in an effort to negotiate the amount of time faculty members stay on staff, many universities have begun offering gradual retirement or phased-retirement plans. According to Christopher Phelps (2010), phased retirement involves reducing professors’ teaching loads and prorating their salaries in return for their tenure commitment waiver at a future date and time. Phelps suggests that such a plan allows faculty members to test-drive retirement. Furthermore, Roger Baldwin and Michael Zeig (2013) suggest phased-retirement plans are also beneficial to institutions: “colleges and universities should think of late-career professors [faculty who have served for at least twenty years and who are fifty-five or older] as distinctive assets that can be utilized in diverse ways to the benefit of their institution and its various stakeholders—students, junior colleagues, alumni and administrators” (2013). One mutually beneficial aspect of phased retirement, according to Phelps (2010), is a university’s ability to call on professors’ expertise to teach on a per course basis: this arrangement provides professors with an opportunity to gradually transition into retirement while simultaneously helping universities meet needs. Baldwin and Zeig (2013) highlight additional advantages of phased retirement, including mentorship opportunities for new faculty members and community involvement, either through consulting partnerships or enrichment courses.

UNC offers its faculty members a phased-retirement plan designed to help ease their transition into retirement. The UNC program “provides an opportunity for eligible full-time tenured faculty members to make an orderly transition to retirement through half-time (or equivalent) service for a predetermined period in return for half-time compensation” (University of North Carolina n.d.). It is voluntary and can be employed after a full-time tenured faculty member (eligible to receive retirement benefits and with at least five years of service at UNC) enters into a written agreement with the employing institution. Any faculty members with such agreements will receive “fifty percent (50%) of the full-time salary they received immediately prior to phased retirement,” which will be paid out over a period of twelve months during each year (and for up to five years) of phased retirement (ibid.). Faculty members are also entitled to 50 percent of their paid sick leave and vacation time. Under this program, faculty members “can work no more than .75 FTE and . . . no more

than 30 hours in any given semester” (ibid.). Additionally, the faculty member has the same “professorial rank and the full range of responsibilities, rights, and general benefits associated with it, except for tenured status” (ibid.).

In a case study of workplace flexibility, Ken Giglio (n.d.) notes that 524 faculty members at UNC have taken advantage of the phased-retirement program since its full-scale implementation in 2001, and participants in the program generally report being satisfied with it. Given the increase in full-time non-tenure-track faculty in higher education, it is likely we will see more phased-retirement and part-time options offered to non-tenure-track faculty. Activists organizing contracts and representing non-tenure-track faculty might consider ways to negotiate parallel programs in new faculty contracts and agreements.

Balancing Teaching and Research: The College of New Jersey

Faculty members at the College of New Jersey reported that the majority of their workdays were spent teaching and completing campus service activities, and that any research they conducted was primarily done on their own time. To reward them for the amount of time they spent teaching and mentoring undergraduate students while simultaneously increasing the amount of time available for research, the College of New Jersey overhauled its curriculum in 2003 to focus on undergraduate research and what Jeffrey Osborn, the dean of the School of Science, calls the “scholar-teacher” model (quoted in Flaherty 2014). Flaherty explains how this new model, which was pilot tested during the 2004–5 academic year, reduced the average number of courses that faculty members taught from four to three, to give them six additional working hours per week to devote to research. In this new arrangement, faculty members were asked to involve undergraduate students in their research to the greatest extent possible. To encourage greater collaboration with professors on research initiatives, undergraduate students could enroll in four courses per semester (instead of five); each course would be worth one more credit than was the case under the previous model (Flaherty 2014). Thus, each course would be more intensive and allow students more time to engage in collaborative research. In addition to offering support for faculty research objectives, this new curriculum benefited students, according to Flaherty, because the rigorous nature of the courses helps prepare students for graduate studies. Faculty then had one less course to prepare for, and more of their teaching time was supporting their research.

To further assist faculty members in focusing on research, the university permits them to apply for support in the form of what are known as scholarly activity course releases, which allow them to devote more of their work hours to research (Flaherty 2014). In addition to course releases, professors can request workload credit (determined on a departmental basis) for organizing and facilitating independent research group sessions. Flaherty provides an example of

professors in the humanities who have led such sessions and received a course release (one per year) in return. This new curricular model also has a summer component: an eight-week mentored summer session, during which undergraduate students work with professors on research-related activities; professors receive a stipend for their work on campus over the summer (Flaherty 2014). The College of New Jersey encourages professors and students to present the collaborative research they conducted at conferences and at the Celebration of Student Achievement every spring.

Faculty rewards have also been revised to reflect this new “scholar-teacher” model: Flaherty notes that the College of New Jersey has incorporated “heavy involvement in undergraduate research” into its tenure and promotion guidelines (2014). Amanda Norvell, an associate professor of biology and president of the Faculty Senate at the College of New Jersey, contends that the new model also encourages faculty recruitment and retention: “I think faculty see that the college supports faculty and students working meaningfully together. It really puts the money behind it and gives credit where credit is due” (quoted in *ibid.*).

Conclusion

In reflecting on the vignettes at the beginning of this chapter and the real reforms described above, we ask: what is needed to implement these new work agreements? First, institutions and individuals need to get out of the mind-set that there is only one career track and one way of working that is ideal, legitimate, and satisfying. Careers need to be customized, and there is no one-size-fits-all model. However, the diversity of faculty members’ interests and talents can benefit institutional missions and goals if targeted appropriately. Second, individual faculty members and institutions need to enter into a trust relationship that assumes there is not a zero-sum game. That is, faculty members and institutions need to be willing to compromise in ways that allow both parties to win, and to trust that both will live up to their part of the bargain. For example, if faculty members enter an alternative career track, but its standards are not used by department committees in making tenure or promotion decisions, the agreement will not work. Likewise, if a faculty member agrees to work part time for one institution but then simultaneously collects full-time pay from another institution, the program will not work and will be eliminated. Third, institutions need to recognize that they have a valuable resource that can be used to attract and retain talent: flexibility. Dan Pink describes “the ingredients of genuine motivation as . . . autonomy, mastery, and purpose” (2009, 46). He notes that organizations need to think about motivating people not with money but with other things they want in their lives, such as flexibility in time and tasks. Many institutions may not be able to recruit faculty stars away from other

institutions with larger labs, higher salaries, and other financial resources. Yet if they create flexible policies such as those described in this chapter and enter into shared agreements with faculty members, they will have the kinds of resources that motivation research shows us are most valuable to today’s workers. We suggest that the above-mentioned reforms in organizing practices and work structures may result in greater satisfaction for faculty members and their institutions by allowing both parties to achieve their goals.

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A New Paradigm for Faculty Work and Evaluation

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A universitywide commitment to student learning is the most productive way to address contemporary concerns about the value of higher education in an environment of increasing costs and limited employment opportunities for graduates. To facilitate the shift from a primarily individualistic approach to a community-based approach to faculty work, a new model for faculty work and evaluation is needed—one that places student learning at the center. A grant from the Teagle Foundation, "Preparing 21st Century Students through New Visions for Faculty Evaluation," provided an opportunity for members of the New American Colleges and Universities (NAC&U) to study change in faculty work as a result of technology, dual-career families, new student-centered pedagogies, and increased expectations for faculty involvement in community service.

We propose an approach to the faculty reward system that recognizes the totality of faculty work and an approach to managing the faculty workload that will more effectively support student learning. A new management approach for departments that provides more departmental autonomy is needed to support these changes in faculty workload and evaluation.

Our work has led us to three conclusions:

1. Academic departments need the flexibility to support differential work by its members.
2. The faculty workload needs to be defined in ways beyond the number of credits hours taught, to include all aspects of faculty work.
3. Faculty evaluation must recognize that the expanding definitions of teaching, scholarship, and service necessitate a more flexible and holistic approach to evaluation.