FACULTY AFFAIRS PRACTICES FOR HOLISTIC FACULTY SUCCESS

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Chapter 1

Defining Holistic Faculty Success Through Three Lenses Based on Career Theory

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Objectives

- Recognize variations between higher education institutions, faculty representation, researchers, organizations, and grant funders about their understanding of faculty success.
- Share conceptually unconnected literature on faculty success and academic career success.
- Review career theory and academic career success.
- Standardize the definition of holistic faculty success by grounding in career theory.
- View the definition of holistic faculty success through three lenses, one for the individual, another for the institution, and a third for the sector of higher education.
- Utilize objective and subjective dimensions of holistic faculty success as appropriate for the applied lens, and determine their indicators.
- Extend variables/factors and support concepts from career theory to generate ones that influence holistic faculty success.
- Determine the needed intra- and extra-organizational support that enhance faculty competencies to lead to their success.

Higher education institutions (HEIs), faculty representation (senate, union, association, or other), and faculty members usually use the terminology "faculty success" in various contexts to discuss faculty members' aspirations and needs to achieve success, retention, and career advancement through promotion, tenure, and contract renewal, provide advice or guidance for faculty members to pursue their own success, and offer programming to support faculty success. Programming and support may be offered to all faculty members (referred to throughout the book as faculty or faculty members) in general or may be tailored to faculty at specific career stages and minoritized faculty. There are various studies about faculty success in the literature using the terminology "faculty success" or "academic career success", while there are many studies that evaluate certain aspects of faculty success without using that terminology. In addition to HEIs, faculty representation, and scholarly studies, professional organizations and USA federal research-

funding agencies provide their own vision of faculty success and how to support it. Moreover, several surveys are available from various organizations and providers for use by HEIs that assess certain aspects of faculty success such as faculty experience and satisfaction and predicting retention. All of these parties do not use a uniform definition of faculty success.

Faculty success in literature

The wording "faculty success" is used in titles of few journal articles and book chapters (less than 190 resulting from a search of titles using Google Scholar, and 42 using ERIC). These studies assess or predict faculty success in one or more particular aspect of their job. For example, among these articles, scholars from various disciplines published papers and books on faculty success by connecting it to tenure, promotion, mentorship, onboarding, professional development, satisfaction, perceptions, motivation, work-life balance, academic achievements, research productivity, performing faculty responsibilities in one or more aspects of teaching or scholarship, thriving in a teaching- or research-focused institution, and sharing some institutional barriers to faculty success [1-14]. Several studies were dedicated to faculty success of new, mid-career, or minoritized faculty by sharing predictors, barriers, or strategies for supporting and retaining these faculty members [3, 15-28], and some articles provided advice to faculty on how to achieve success [29-32].

Another concept related to faculty success that has been explored since the 1980's is faculty vitality. Faculty vitality was defined in 1985 as "those essential, yet intangible positive qualities of individuals and institutions that enable purposeful production" [33]. Various contributions [34-36] to the definition, indicators, and needed support like leadership, networking, and mentorship have been taking place until the definition got expanded in the medical discipline in 2011 to "faculty vitality is the synergy between high levels of satisfaction, productivity, and engagement that enables the faculty member to maximize his/her professional success and achieve goals in concert with institutional goals. Faculty vitality is predicted by both individual and institutional factors" [37]. Faculty vitality and/or inclusive excellence have been measured using several surveys including Faculty Vitality Survey© [38], C-Change Faculty Survey© [39-41], and Faculty Thriving Quotient [42]. All these surveys contain various items that measure faculty vitality/thriving in relation to their experience and their workplace support and environment. These items are the same ones that are used to measure objective and subjective faculty success that are described below.

In addition, there are many studies that examine specific aspects of faculty success without using that terminology (such as studies about faculty satisfaction, and success in productivity, promotion and tenure, and other aspects) and many are cited throughout this book. Moreover, there is a bulk of scholarly work by researchers from various disciplines who are examining academic career success that is grounded in career theory as discussed below. These two groups of researchers, one focusing on faculty success and another focusing on academic career success,

seem to have worked independently of each other without connecting their concepts. Furthermore, there is a bulk of literature that is cited throughout this book that does not use the terminology of faculty success or academic career success but discusses various specific objective and subjective aspects of faculty success.

Faculty success according to professional organizations and USA federal funding agencies

The National Center for Faculty Development and Diversity (NCFDD) offers a program to support faculty success [43]. The program helps faculty in setting achievable goals while focusing on maximizing productivity, achieving work-life balance, prioritizing self-care, achieving academic excellence, and fostering a positive work environment [43]. Federal providers of grant funding that support faculty careers or success have their own vision of initiatives that support faculty success. For example, the funding by the National Science Foundation (NSF) for Faculty Early Career Development Program (CAREER) aims at supporting proposals that "describe an integrated path that will lead to a successful career as an outstanding researcher and educator" [44]. The two recently discontinued NSF programs; ADVANCE funding for minoritized STEM faculty [45], and the Alliances for Graduate Education and the Professoriate (AGEP) for minoritized faculty, students, and trainees [46], both aimed at diversifying the STEM academic and research workforce through evidence-based systemic or institutional change initiatives to promote equity and advancement in STEM. These organizations do not define faculty success; nonetheless, they focus on practices that support success.

Surveys related to faculty success

There are several surveys, other than those developed for individual/group of researchers' use, that are available for HEIs' use to assess various aspects of faculty success with associated fees. Some of these were shared above such as Faculty Vitality Survey© [38], C-Change Faculty Survey© [39-41], and Faculty Thriving Quotient [42]. The Faculty Vitality Survey© measures faculty satisfaction, perceptions of their primary unit climate and leadership, career and life management, and engagement and productivity in scholarship, education, and clinical work [38]. The C-Change Faculty Survey© "assesses faculty perceptions of their institutional culture, and professional experiences including: Levels of vitality, trust, professionalism, feelings of being respected and belonging, gender and diversity, inclusion, respect, mentoring, and other constructs related to the organizational culture for faculty" [39-41]. The Faculty Thriving Quotient assesses "faculty flourishing in five dimensions: meaningful engagement, institutional affinity, relational support, student impact, and affirmed value" and assess three pathways to thriving in the faculty role: trusted leadership, equitable environment, and work-life integration [42].

Additional surveys that evaluate faculty experience and satisfaction that are available for HEIs to use for a fee include Collaborative on Academic Careers in Higher Education (COACHE) survey and Higher Education Research Institute (HERI). The COACHE's faculty job satisfaction survey

assesses faculty "experiences regarding promotion and tenure, the nature of their work, policies and practices, and the general climate, culture and level of collegiality on their campuses" [47]. The survey by HERI evaluates faculty experience in "pedagogical practices, faculty goals and expectations for students, research and service activities, sources of stress and satisfaction, and the connection between learning in the classroom and practices in the local and global community" [48].

COACHE also offers a Faculty Retention & Exit Survey to determine faculty members' push factors (reasons that drive them away) to leave current institution and pull factors (attractions) to join elsewhere [49]. An additional survey is a diagnostic faculty retention survey by Academic Impressions that predicts faculty retention by creating a retention score based on averaging three scores for three areas that include sense of belonging, faculty workload and growth, and leadership support [50]. This is in addition to published research studies that utilize surveys generated by researchers to measure various aspects of faculty satisfaction.

All this demonstrates that there are existing variations between HEIs, faculty representation, researchers, organizations, and grant funders about their understanding of faculty success. Some may be working independently and not necessarily connecting their work to each other, except for connecting to published relevant evidence-based work.

Definitions of faculty success

Studies on faculty success, or alternatively academic success, do not necessarily use a uniform definition for faculty success. In 2012, Reis and coworkers quantified "academic success based on several measures including (1) leadership and professional activities, (2) honors and awards, (3) research grants, (4) teaching and mentoring/advising activities, and (5) publications" [51]. In 2015, Stupnisky defined faculty success through stating (I removed their cited references from the definition) that "previous studies have identified faculty success as, among other things, research productivity, teaching success, low stress, job satisfaction, and career commitment. Some studies have examined several other variables as success outcomes, such as clear expectations, good interpersonal relationships with other faculty members, and balance between work and family; then in other studies these same variables have been examined as predictors of success" [3]. Stupnisky and coworkers shared indicators and predictors of success of new faculty (within three years of hire) that included research productivity, teaching success, low stress, job satisfaction, career commitment, clear expectations, positive relations with colleagues, and life-work balance [3]. The study reported emergence of four themes for success that included clarity of expectations, work-life balance, collegiality/support, and living/job location [3]. Moreover, Stupnisky defined faculty research success "broadly as contributing to the scientific advancement of a scholarly field of inquiry and be recognized for it" with acknowledging challenges in measuring it [12].

Most recently, in 2024, Jaeger and coworkers defined faculty success as "faculty retention, faculty satisfaction/sense of belonging, faculty productivity, and ultimately student success (e.g., learning, retention, completion, transfer)" [52]. This definition was based on the study's extension of a student success framework to faculty success, which was additionally informed by interviews with faculty at community colleges [52]. I recently utilized this definition to recommend metrics to be used by faculty affairs units and HEIs for measuring internal faculty success within the HEI [53]. Those metrics included faculty numbers and success rates in awarding promotion, tenure, contract renewals for core and VITAL faculty (VITAL = Visiting, Instructors, Temporary, Adjuncts and Lecturers [54, 55]), and sabbaticals; median and average progression through promotion on time; faculty retention metrics; measuring faculty members' sense of belonging and satisfaction; specific indicators of faculty productivity in teaching, research/scholarship, and service, and faculty recognition indicators [53].

Performance indicators

For the purpose of predicting faculty success, the teaching performance indicators include student evaluation of teaching, peer assessments of teaching, contribution to graduate student advising and committees, creating or improving courses and programs, having a sense of academic freedom and choice in teaching, and engaging regularly in innovative teaching practices [56]. The research performance indicators include high number of refereed journal articles, chapters, or books, published good quality journal articles with citations, conference presentations, exhibitions, creative works, and secured high number of external research grants [56, 57]. The service performance indicators include having administrative roles, engaging in activities for a national or international association, and serving on departmental committees [56].

Besides publications on faculty success and vitality, there is a bulk of work about academic career success that is grounded in career theory with characterizing objective and subjective dimensions of career success. To generate a uniform definition of faculty success, this chapter connects the work by the various groups mentioned above and grounds faculty success in career theory.

Career theory

Career studies are carried out by researchers from multiple disciplines who examine careers through their own research perspectives or collaborations, including researchers in sociology, psychology, anthropology, organizations, occupations, economics, management, education, history, geography, and political science [58-61]. This led to ***defining career theory as*** "the body of all generalizable attempts to explain career phenomena" [60].

Career is defined as the perception of an unfolding sequence of a person's work experiences over time [60, 62]. The study of careers involves examining relations between the individuals and the organizations (employers or work settings/environments) [60].

Careers could be boundaryless, meaning not bounded or constrained within one organization, but independent from organizational structures and boundaries, and could be across separate organizations or employers with different directions in one's career [63]. Furthermore, careers could be protean, which is a term that is "derived from the Greek God Proteus, who could change shape at will" [64]. The protean career concept refers to careers that are self-driven and self-managed by the individual according to their own terms, rather than by organizations or employers [65, 66]. The individual defines their own career values, serves as their own agent, and self-directs their own career advancement and needed development. To do so, the individual employs three processes: self-awareness, adaptability, and agency [67, 68].

Career success is defined as the attainment of accumulated desirable positive work outcomes, material and psychological, at any point within one's career experiences over time [69-71].

Objective and subjective duality of career success

The literature on career success informs us that there are objective and subjective dimensions of career success [61, 69, 72-74] that were first described by Everett Hugh in 1958 [75].

Objective career success (OCS): The status of career success that is externally observed and measured using tangible indicators [69, 75]. The OCS indicators mostly reflect society's understanding and evaluation of achievement or career success. Examples of these extrinsic indicators include being employed with a prominent employer/prestige, salary and its growth, promotion and hierarchal rank/level, level of responsibility, bonuses, rewards, recognition, number of subordinates, and job performance indicators [61, 69, 74-78].

Subjective career success (SCS): The status of career success that is related to the employee's self-perception of their own career [69, 75]. This self-perception mainly has to do with fulfilling psychological, personal life, and social needs [78-82]. The SCS may be examined through intrinsic indicators, such as fulfilling goals, having purpose or a calling, location of work, satisfaction and happiness, work-life balance, challenge, creativity, social support, opportunities for growth, absence of barriers, one's positive impact/influence, respect/recognition, self-esteem, autonomy/independence, entrepreneurship, work relations, appreciation, no discrimination, justice, sense of integration, financial security (basic financial needs), financial success (achieving growth in income and wealth), access to learning and development, adaptability, organizational commitment, and job security [69, 73, 74, 76, 78, 81, 83, 84].

Both OCS and SCS may be evaluated either by the individual based on their own standards. i.e. self-referent, or in relation to the expectations of others, i.e. other referent [74].

Variables/factors influencing career success

There are various variables or factors (both terms are used in literature) that may cause differences in outcomes or may provide opportunities to promote career success or cause constraints to hinder it. These variables/factors include human capital and competencies (work experience, knowledge, skills, abilities, and training), social capital (referrals, networks, resources, and support), personal factors (age, gender, race/ethnicity, marital status, being a caregiver, and social origin), behavioral attributes (personality traits, self-esteem, self-efficacy), structural factors (organizational practices, policies, support, sponsorship, culture, socialization, and unexpected arising contingencies or events), government contextual factors (politics, economics, labor market opportunities), ideological contextual factors (culture, power, domination, subordination, and resistance), and cultural and geographical contextual factors that vary by country and/or region within the same country [61, 69, 71, 72, 74, 77, 85-93].

Supporting career success

Supporting career success is impacted by career competencies and support to the individual. *Career competencies are defined as* "knowledge, skills, and abilities central to career development, which can be influenced by the individual" [90]. Support to the individual to build their career competencies includes intra-organizational and extra-organizational support. The intra-organizational support could be in the form of guidance (from supervisors, coworkers, mentors, and networks) and opportunities for learning and professional development [94-96]. All these enhance the individual's human capital and behavioral attributes. The extra-organizational support may be through connecting with peer groups, networks, mentors, organizations, and local community [69, 97, 98]. The extra-organizational support enhances the individual's social capital, and potentially their human capital through externally offered professional development.

Academic career success with its objective and subjective dimensions

There are several studies, contributing to career theory, that focus on academic career success and that specifically examine OCS and/or SCS in academic careers, through self-referent or other-referent standards. Essentially, academic career success for faculty is faculty success. Nonetheless, one has to be careful in examining academic career success studies because some refer to the success of teaching staff (instructors or faculty) while others refer to the success of teaching and non-teaching staff (faculty and staff combined). Career success studies have mostly been done in the context of countries that are Western, educated, industrialized, rich, and democratic [77]. On the other hand, when one focuses specifically on academic career success, there are several studies from non-Western countries that evaluated the status of academic career success within higher education in their countries.

It was reported that teaching, research, and service are drivers for both OCS and SCS [99]. Since there are variations between faculty depending on their years of service, there is a value in examining faculty success by career stage [100]. Some studies specifically selected salary as an OCS indicator and satisfaction as an SCS measure [99, 100]. This allowed comparing academic career success to career success studies in other non-academic professions. On the other hand, other studies that were not concerned with comparing to other professions listed additional OCS and SCS indicators.

The aspects of the objective dimension for academic career success (meaning for faculty success) included salary increase and adequacy, progressing in academic career ladder (e.g. tenure, promotion by having higher academic ranks, and leadership positions), job stability (e.g. tenure, and non-temporary position), teaching performance and evaluations, research productivity (number of articles published in peer-reviewed and indexed journal, citations, number and amount of external grant funding, and mentoring and graduating graduate students), recognition (internal and external awards and recognition, and disciplinary reputation), collegiality and positive relations, and influence to cause change [101-104]. The last two may also be considered subjective aspects.

The aspects of the subjective dimension for academic career success included life- and job-satisfaction, contribution to development of others including students and community, self-professional development, being innovative in generated products, achieving work-life balance and integrative lifestyle, independence/autonomy, academic freedom, and job security [101, 104]. Some studies reported that faculty may define their faculty or career success in relation to their impact on student success [52, 99].

Variables/factors influencing academic career success

It was reported that faculty work engagement and work-life balance were drivers for career success outcomes (advancement, compensation, and satisfaction) for 400 teaching faculty in 32 universities in Pakistan [105]. Kraimer and coworkers proposed a theory of academic career success that is mediated by work engagement, which is a motivational state of mind in reaction to one's work activities [100]. Work engagement is defined as a positive psychological state of mind of feeling fulfillment and well-being that is characterized by high level of energy, vigor, dedication, and absorption into one's work tasks [106].

In academia, work engagement was found to be impacted by work stressors (role overload and family interference with work) and career shocks, which are expected or unexpected events that have either positive or negative effects such as incidents (positive or negative), awards, tenure, promotion, grants, publications, performance evaluations, and leadership roles [100]. The Kraimer study proposed predicting variables of academic career success, which included demographic traits, human capital, motivation, social capital, and institutional support [100]. In

addition, academic careers are impacted by multiple contexts including organizational, cultural, and national contexts [107, 108]. Gender differences for faculty members in relation to various factors and career shocks have been reported with more barriers for academic career success for women [101, 109-115]. Similarly, social identity of faculty and individual behaviors impacted their academic OCS and SCS [116]. Additional studies about barriers for women and minoritized faculty are shared in Chapter 4 about supporting the subjective dimension of faculty success including sense of belonging, well-being, and satisfaction. Furthermore, academic OCS and SCS are impacted by specific organizational contextual determinants like "being part of the system culture", publish or perish, competitiveness, and existence of clear structured career path; and individual variables (higher level of education, self-efficacy, self-investment, and being goal-oriented) [117-119]. So just like the variables/factors impacting any career success, the ones impacting academic career success fit individual, structural, and contextual ones.

Supporting academic career success

Similar to other careers, building competencies may be impacted by the individual and the intra- or extra-organizational support. There are several studies specifically on the impact of individual human capital and intra- and extra-organizational mentorship, and networks on academic career success with highlighting gender differences [95, 102, 113, 120, 121].

Proposed new conceptual model of faculty success

Both definitions of career and career success mainly center the individual while ignoring the organizational practices and other contexts with their influences on one's career [119, 122, 123]. However, for faculty affairs units in academia, the interest is mainly in examining how their institution (context, practices, structures, and policies) supports faculty success internally as a whole [53] (which is the subject of this book), with comparing that to faculty success within the whole sector of higher education (HE), which may or may not be subclassified based on the type of institution, e.g. research or teaching, public or private, large or small, by budget size, or other distinguishers. Furthermore, there is an interest in examining individual faculty success by departments and schools/colleges. Thus, to take into consideration both the individual and the context, I define faculty success with its two objective and subjective dimensions using three lenses, one is the individual lens, which will be referred to as individual faculty success, the second is the HEI lens, which will be referred to as institution's faculty success (or faculty success within the institution), and the third is the lens of the HE sector (with or without subclassifications), which will be referred to as faculty success within the HE sector.

This examination of faculty success through these three lenses is extendable to examination of career success for any career. For example, a company may examine career success for a particular category of employees, such as accountants, or administrative assistants, or another group within it. In addition, a professional organization representing a specific sector may

examine career success within their sector. This is in addition to the individual's lens for their own career success.

Defining individual faculty success

I adapt the career success definition to individual faculty success to define it as the attainment of accumulated desirable positive work outcomes, material and psychological, at any point within one's career experiences as a faculty member over time.

An individual's faculty success is independent of changing their HEI or their pathway and type of faculty position. So, it may be variable by changing HEI or constant at one HEI, tenure-line or non-tenure line, VITAL faculty position, and full-time or part-time. Meaning that the individual faculty success could be boundaryless as a faculty member's academic career could span several HEIs with following different directions based on the faculty appointment type or could be thought of within the context of one HEI within one or more faculty pathways, depending on what is being evaluated. The faculty member may have a protean attitude toward their own career where their own values help them self-direct their teaching, research, and service at one HEI or more.

Both objective and subjective dimensions of faculty success may be evaluated by the individual faculty either based on their own standards and aspirations, i.e. self-referent, or in relation to the expectations or achievements of others, i.e. other-referent. In addition to evaluations by the individual faculty themselves, evaluations of individual faculty success by others take place in academia in the form of reviews for annual or periodic evaluations, promotion, and tenure.

Defining institution's faculty success

I define institution's faculty success, or faculty success within a particular institution, as the attainment, by all faculty or a particular faculty category within the institution, of accumulated desirable positive work outcomes, material and psychological, at any point within that group's/category's faculty career experiences over time within that institution.

The institution's faculty success is bound to one HEI only and it would be tied to the HEI's definition of academic career success for specific faculty categories within that institution. This means that the institution or the faculty affairs unit(s) within the HEI could examine faculty success for all full-time faculty together, or for a particular faculty category/group, such as tenure-line faculty success, VITAL full-time faculty success, part-time faculty success, clinical faculty success, particular rank or stage faculty success, etc. This definition and its metrics are of utility, not only to HEIs, but also to accreditation agencies as they update their standards in relation to faculty for assuring quality and alignment with higher educational standards.

The HEI, besides their responsibilities for faculty development to succeed at their institution, should additionally offer professional development events that relate to one's planning for their protean career whether at their current HEI or for employment elsewhere. Furthermore, as faculty affairs units (FAUs) plan supporting success of their faculty, they should expand the protean concept to become an institutional one, not only an individual concept. The is due to the dominant influence of the HEI on faculty career success, as opposed to the individual faculty member's influence. The dominant influence of the HEI is not only a result of their expectations of faculty workload and advancement as set in faculty handbooks, but is also caused by the HEI's mission, values, their type of institution (research or teaching focused, having tenure lines or contract lines, etc.) and their responsibility in supporting the holistic success of faculty through their faculty affairs practitioners. When a faculty member joins an HEI, everything is already set at the institution and the faculty conforms to expectations and how things are done, with expecting support from the institution. In that way, there is an institutional protean aspect to faculty careers at the HEI. This institutional protean aspect would be carried out by its FAUs by employing the three processes of being protean in their attitude toward faculty careers. These processes include self-awareness (of the institution's mission, values, policies, practices, and expectations that impact faculty success), adaptability (adapt to changes, needs, and evaluations to enhance faculty success), and agency (interventions to enhance faculty success and the success of FAUs in supporting faculty success).

Ten steps were shared in 2002 for promoting individual successful protean careers [124]. I adapt the concepts and ten steps for individual's protean career to propose developing an institutional protean attitude to support faculty careers within it. The institutional responsibility in doing so falls on FAUs or the faculty affairs practitioners within the HEI, through steps to:

1. Recognize that the HEI plans and supports their faculty members' careers.
2. Plan and offer professional development for all its faculty members, in various manners that are stage-dependent, identity-supportive, and well-being-fulfilling and provide helpful resources.
3. Recognize that the faculty career development is a relational process where both the HEI and the faculty member play a broker role.
4. Integrate faculty career expectations with mentoring, coaching, networking, consulting, technology, and evaluations.
5. Provide effective communication structures to allow faculty representation to negotiate boundaries and needs such as crediting workload, assisting career advancement, promoting work-life balance, caring for the well-being of the individual, and offering holistic support as detailed in this book.
6. Promote work planning through providing opportunities and support for continuous learning, development, and holistic faculty success.
7. Facilitate building collegial and professional relations internally and externally, networking, and promoting professional reputation and internal and external recognition.

8. Provide stimulating and respectful work experiences with opportunities and support for growth into leadership positions.
9. Provide opportunities and resources for learners, credit the learning towards faculty workload, and value learners as well as high performers.
10. Develop the mindset of promoting and providing resources for inclusive faculty development in relation to shifts in technology, services, and faculty expectations while providing periodic constructive feedback and guidance.

This way, besides the faculty member planning their protean career, the HEI fulfills its responsibility in planning the institutional protean career of its own faculty. This institutional protean career concept could be adopted by any organization examining any specific career within it.

Defining faculty success within the HE sector

I define faculty success within the HE sector as the attainment, by all faculty within the HE sector or by a faculty subcategory within the sector, of accumulated desirable positive work outcomes, material and psychological, at any point within that group's/category's career experiences over time as faculty members within HEIs.

This examination of faculty success could be within the whole sector of HE or within subcategories that could be based on the institution type like two-year institutions, four-year teaching-focused HEIs, four-year research-intensive, private, public, etc. For this examination, faculty success would be boundaryless and would be for the purpose of generating a general understanding of trends and collective data.

Objective and subjective dimensions of faculty success

The subjective and objective dimensions of faculty success can be measured using specific indicators. To create indicators for objective and subjective aspects of faculty success, I combine the above cited literature on faculty success with the work in career theory in general, and more specifically in academic career success. Appropriate indicators could be applied to each of the three lenses of faculty success: the individual, the institution, and the HE sector as selected by a faculty affairs practitioner or researcher.

Objective faculty success

Aspects of the objective dimension of faculty success could include salary and its growth rate, faculty rank, promotion and tenure attainment, time to promotion or tenure for each rank, successful contract renewal for core and VITAL faculty, success of progressing from one-year to multi-year contract, award of sabbaticals, bonuses, awards and recognition (external and internal),

progression to leadership positions, and job performance indicators. Job performance indicators include workload and productivity indicators for teaching, research/scholarship, and service, and scores or outcomes (or equivalent) for reviews such as annual evaluations or periodic reviews.

For individual faculty, additional objective aspects may be important such as being employed with a specific type of HEI (e.g. teaching focused institution, two-year HEI, Ivy League HEI, R1 institution, highly community-engaged or serving institution, minority serving HEI, historically Black colleges and universities, or an HEI with a particular type of prominence or prestige), self-professional development, being innovative in generated products, job security, and progressing to leadership positions with time to progression and number of subordinates.

For institutions and FAUs, additional objective aspects include success rates for promotion, tenure, contract renewals for core and VITAL faculty, and sabbaticals; median and average progression through promotion on time; and retention or attrition rates. Examination of these rates provides indicators for objective faculty success. Similar analysis could be done for the sector for available data from the National Center for Educational Statistics, organizers of the Delaware study [125], Higher Education Research Institute (HERI) [126, 127], or various HE organizations. The data could be disaggregated by gender, race/ethnicity, and various other identities for comparisons to detect where additional attention is needed by the institution or the sector.

Subjective faculty success

Aspects of the subjective dimension of faculty success could include fulfilling goals, having purpose or a calling (e.g. for serving the local or global community, benefiting minoritized communities and students, pursuing a particular type of scholarship, or teaching about topics that are close to one's heart or passions), location of work, personal and professional satisfaction and dissatisfaction, crediting workload, work-life balance, work challenge, creativity, engagement, social support, opportunities for growth, absence of barriers, having positive impact/influence, respect, recognition, self-esteem, autonomy/independence, academic freedom, entrepreneurship, work relations, appreciation, no discrimination, justice, sense of integration, sense of belonging, well-being (emotional and physical) without burnout, financial security (basic financial needs), financial success (achieving growth in income and wealth), access to learning and development, adaptability, organizational commitment, and job security. When examining faculty satisfaction, it was recommended to examine both satisfaction and dissatisfaction because they are distinct and satisfaction does not automatically mean absence of dissatisfaction [128]. Indicators for these subjective aspects could be generated by surveying faculty members.

Supporting the objective and the subjective dimensions of faculty success encompasses the professional and the personal aspects, i.e. the thinking is of the whole person instead of focusing on specific professional parts. Thus, holistic faculty success, using the three lenses above, recognizes the interconnectedness of not only the professional roles of faculty within the

professional institutional context, but also their personal lives, and elements of their well-being (physical, mental, emotional, psychological, etc.) within social, ideological, and cultural contexts. The FAUs should consider planning a comprehensive faculty support plan that encompasses not only their professional development and mentorship as professionals serving within the context of their institutions, but also their development and care for their mind, well-being, and emotional and physical health while considering social, ideological, and cultural contexts that are shared below.

Selecting appropriate indicators for the applicable lens

The objective and subjective aspects of faculty success shared above can be measured using specific indicators that are dependent on the lens used, the individual, the institution's, and the sector's. Some indicators that are considered objective ones using one lens may be considered subjective or both objective and subjective when using another lens. For example, retention rate of faculty is an indicator of objective faculty success for the institution; however, for the individual, retention is personal and it is both an objective and subjective aspect of success. Faculty retention within the HE sector has been examined as an objective aspect by researchers, the American Association of University Professors (AAUP), and other organizations. Faculty satisfaction within the sector, which impacts faculty retention, is examined by organizers of the Collaborative on Academic Careers in Higher Education (COACHE) [47] or HERI [126, 127], or by researchers through their scholarly published work, some of which is cited throughout this book.

Indicators for institution's faculty success

Since this book focuses on the institution's lens for faculty success, I am listing here the specific indicators based on the above objective and subjective aspects of holistic faculty success that are applicable to this lens and that will be shared in the rest of the chapters.

The institution's indicators for objective faculty success include:

- Average and median faculty compensation and growth rate over the years (its adequacy).
- Number of faculty at different ranks.
- Success rates for promotion, tenure, contract renewals for core and VITAL faculty, and sabbaticals.
- Median and average time to promotion for each rank.
- Success rates for contract renewal for core and VITAL faculty and progressing from one-year to multi-year contract.
- Numbers and percentages of faculty receiving bonuses, awards, and recognition (external and internal).
- Retention or attrition rates.

- Progress towards leadership positions with time to progression and number of subordinates.
- Job performance indicators that include workload and productivity indicators for teaching, research/scholarship, and service, and scores or outcomes (or equivalent) for annual evaluations or periodic reviews.

The institution's indicators for subjective faculty success include:

- Crediting workload.
- Personal and professional satisfaction and dissatisfaction, sense of belonging, and well-being: Mental health, well-being (emotional and physical), stress, burnout, morale, work-life balance, social support, opportunities for growth, absence of barriers, positive environment, engagement, positive work relations, no discrimination, justice, and sense of belonging and integration.
- Access to learning and development.
- Academic freedom, autonomy/independence, and freedom of speech.

As can be seen from the above lists, they overlap with the indicators examined by studies listed above under the section titled "Definition of faculty success in literature" and by various HEIs, and HE organizations and federal funders. Some studies shared that student success is an indicator of faculty success [52, 99]. Although this is partially true, faculty success should not be measured by student success because student success is more complex and results from many factors whereas faculty have an influence on specific aspects of student success. When well-prepared faculty facilitate effective teaching and learning, and provide support and mentorship to students, this results in improving student learning outcomes. However, other players like student affairs, student academic support, financial aid, campus climate, career center, health and well-being center, and other units within the HEI contribute to student success. Thus, although faculty success contributes to student success, student success should not be a measure of faculty success.

Since the objective and subjective dimensions of faculty success encompass not only professional aspects but also personal and well-being aspects, this means that the institution lens examines holistic faculty success. Throughout this book, I interchangeably use the terminology faculty success and holistic faculty success.

Variables/factors influencing holistic faculty success

The variables/factors that impact holistic faculty success are similar to those listed above for career success in general, and several have been studied in relation to academic career success.

By extending the variable/factors shared above for career theory, the variables/factors influencing holistic faculty success may include the following:

- The faculty human capital variables and competencies, such as prior work experience, knowledge, skills, and abilities; training in relation to teaching, research/scholarship, writing, service; and abilities to form networks and manage time [102, 129, 130]. The human capital could vary by career stage, so for studying, it could be divided into early career, mid-career, mature/advanced career. It also could vary by faculty category, so that could result in further subclassification for studies.
- Social capital variables [102], such as referrals by, and scholarly collaborations with internal (to one's institution) and external colleagues; and resources and support provided to the faculty member through their institution or internal and external networks.
- Personal factors, such as age, gender [102, 129, 131, 132], race/ethnicity, marital status, being a caregiver, social origin, and identity. The personal factors could cause variations in perceptions of success by the individual and others.
- Behavioral attributes, including personality traits, self-esteem, self-efficacy, self-advocacy.
- Variations between academic disciplines [129].
- Structural factors, such as work engagement, organizational practices, policies, support, sponsorship, competitiveness, culture, collegiality, socialization, climate, and unexpected arising contingencies or events (e.g. cuts, restructuring, mergers, and closures).
- Government contextual factors, for example politics, economics, academic labor market opportunities (e.g. some states are abolishing tenure from their public universities, and the current Trump administration's attack on diversity, equity, inclusion, identities, free expression, and academic freedom).
- Ideological contextual factors within the HEI or within HE in general, including culture, climate, power, domination, subordination, and resistance.
- Cultural and geographical contextual factors that vary by country and/or region within the same country. This includes national culture, labor market, economy, education system, city/town capital, and region differences [133].

These variables/factors affect all three lenses for faculty success. The main difference in applying them would be if they are applicable to the individual, the institution, or the HE sector and what each (individual, institution, or sector) can do about impacting these variables/factors to enhance faculty success.

Supporting holistic faculty success

By extending the concepts from career theory, supporting holistic faculty success will be dependent on the intra- and extra-organizational support provided to the individual to build their career competencies. Faculty competencies are initially built through training on their own and

by their institution, mentors, networks, or coaches, and that may start during graduate school or postdoctoral training. The intra-organizational support may be the most significant in retaining the faculty member at that institution. This type of support is relevant to the second lens and is the focus of this book. It may be coordinated by FAUs, or in absence of such a unit, by faculty affairs practitioners who may include provosts, deans, chairs, human resources personnel, diversity/community center personnel, and centers for faculty development [134]. The HEI needs to ensure that the faculty affairs practitioners have the right competencies to support holistic faculty success to provide the right organizational context for success and to plan their support and interventions to enhance holistic faculty success.

There are many resources through publications and organizations on support through mentorship and professional developments at various career stages that may be consulted for designing programming. This book aims at presenting how FAUs could support holistic faculty success in addition to providing professional development, mentoring, and networking opportunities through the remaining chapters of this book.

Extra-organizational support is also valuable for faculty success and could be through FAUs, external collaborators, peer groups, networks, professional organizations, mentors, coaches, or local community. However, one has to be careful because networking and relationships may either support or harm advancing one's academic career [109, 135], which may be more significant for women [109].

Conclusion

This chapter defined holistic faculty success (I also refer to it as faculty success throughout this book) by connecting concepts and work done by various groups on faculty success, including HEIs, faculty representation, professional organizations, survey providers, federal funders of grants, scholars in career theory, and researchers on faculty success and on academic career success. This resulted in creating a new conceptual model for holistic faculty success with three lenses; one for individual faculty success, another for an institution's faculty success, and a third for faculty success within the HE sector. It shared various aspects of the objective and subjective dimensions for faculty success with their indicators, from which appropriate ones could be selected for assessing faculty success using the three lenses. This concept of using three lenses could be implemented for other careers.

Finally, the variables/factors and the support concepts from career theory were extended to generate the variables/factors that influence holistic faculty success, and the needed intra- and extra-organizational support that enhance faculty competencies to lead to their success. Connecting all the work and standardizing the definition of faculty success through the three lenses, permits uniformity and using career theory knowledge for further studies and assessments of faculty success. This work on faculty success could guide accreditation agencies in updating

quality assurance for their standards of faculty quality and effectiveness, which impact programs' integrity, quality of teaching and learning, and student success. Moreover, the concepts shared in this book about objective and subjective faculty success through three lenses (individual, institution's, and HE sector) are also applicable to staff and administrators within HEIs with few exceptions for some indicators like those related to tenure and academic ranks.

This book focuses on the second lens, that of the institution for holistic faculty success. In certain areas, information about faculty success through the third lens, that of faculty success within the sector of HE, is shared because of necessary comparisons that FAUs need to conduct. The surveys available for HEIs' use when used by the institution, then they provide assessment that is relevant to faculty success through the second lens, that of the institution. However, when used to pool data of participating HEIs, then that is an assessment through the third lens, the HE sector. The value of the third lens is that it provides pooled data to compare institutional findings against.

In this book, I share practices by the institution or its FAU(s) to support the various aspects of objective and subjective dimensions of holistic faculty success in Chapters 2 through 6. In determining the chapter's order in this book, I went with the flow of the writing according to what made sense to me. I felt that it was important to start with crediting workload (Chapter 2), an aspect that fits under both the objective and subjective dimensions of holistic faculty success. Similarly, faculty retention (Chapter 3) fits both dimensions, and it seemed like the natural next topic to present. Faculty retention, attrition, and intentions to stay or leave are determined by the rest of the various aspects of the objective and subjective dimensions, so it felt right to put it ahead of the chapters dedicated to these dimensions. As I started writing about the two dimensions, the flow was easier to first write about the subjective dimension (Chapter 4) with tying the various aspects to the historical Eurocentricity of HEIs and with existing harmful practices within HEIs that impact all faculty in general and minoritized faculty in particular. Some of the harmful practices fit under the subjective dimension, others fit the objective one, and some fit both. From there I went into the objective dimension in Chapter 5, then shared additional aspects of the objective and subjective dimensions in Chapter 6 in relation to responding to various challenges that face HE that impact faculty workload, academic freedom, and freedom of expression. Practices for assessing the objective and subjective aspects using specific indicators of faculty success are shared in Chapter 7. Then Chapter 8 shares some challenges to faculty success around the world that may result from special circumstances in some countries. The book ends with Chapter 9 sharing transformations within faculty affairs units to enable supporting holistic faculty success. This includes sharing the indicators of the objective and subjective dimensions for the success of faculty affairs practitioners, which are also applicable to staff and administrators in HEIs.

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Chapter 2

Crediting Faculty Workload

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Objectives

- Contrast faculty workload activities and productivity.
- Associate crediting faculty workload with the subjective dimension of faculty success while identifying indicators for faculty performance in teaching, research/scholarship, service, and other areas as indicators for objective faculty success.
- Associate changes in pace and evolving needs with increased faculty workload and stress.
- Recognize that a mismatch between what the institution prioritizes and what faculty prefer to spend their time on results in dissatisfaction.
- Associate invisible labor with uncreditable and taxing workload.
- Determine the role of faculty affairs practitioners in crediting faculty workload.
- Apply specific principles for creating a model for crediting workload.

Crediting faculty workload is a subjective aspect of success (see Chapter 1 about defining faculty success) for full-time faculty, both core and VITAL faculty, because it is associated with faculty satisfaction or dissatisfaction with their workload. On the other hand, faculty workload itself is measurable and can be assigned credit and is used to assess faculty performance; so, it has an objective aspect. Faculty workload is defined as "time spent on professionally appropriate activities" [1]. To improve the support of faculty success, higher education institutions (HEIs) need to have a good understanding of faculty time allocations for their workload and to give them credit for their work. Faculty members usually allocate time and effort to their workload activities that include "all faculty activities that are related to professional duties and responsibilities: teaching, research, interacting with students, institutional service, service to the community, and professional development" [2]. These activities are measurable and reflect faculty performance and serve as indicators for objective faculty success.

The average number of hours that faculty spend on their work activities per week in the USA is significant, and it ranges from 50 to 65 hours based on several studies. Studies of faculty time on

workload activities for large data sets revealed 55 hours in 1984 [2], 50.6 hours in 1993 [3], 54.8 hours for men and 52.8 hours for women in 1998 [4], and 52.1 hours in 2004 in public institution [3]. Studies on smaller data sets revealed 65.8 hours (65.3 for men and 65.9 for women) in 2012 [5], 62.5 hours in a 2020 [6], and 59.4 hours for men and 60.3 hours for women in a 2023 [7].

Examination of the time allocations for faculty to teaching, advising, and conducting research activities showed significant changes over a period of 20 years (from 1972 to 1989/1992) in all types of HEIs (research, doctoral, comprehensive, liberal arts and two-year HEIs) [8]. The study was based on analyzing three large national surveys using questions with a 9-point scale [8]. The allocations of faculty time on research activities significantly increased in all types of institutions, except for two-year HEIs [8]. In addition, faculty in all types of institutions, except for research HEIs, experienced significant increases in time allocated to teaching and preparing for teaching [8]. Similar findings were reported by National Center for Education Statistics (NCES) about time conducting research for all institutions, even for two-year HEIs between 1987 and 1992, and that the contact hours with students in and out of class increased for all institutions with the highest increase for two-year HEIs [9]. The reality is that faculty workload and their time allocations for it have been changing over time with new added responsibilities [10], such as those relevant to preparing students to be locally and globally engaged citizens [11].

To examine faculty performance, usually HEIs use productivity indicators or metrics, which are mostly quantitative metrics for positive outcomes or products as a result of some of the faculty workload activities [12]. Whereas workload is the time spent on activities, productivity is what gets produced with that time, and not every workload activity results in productivity [1, 3, 12]. The productivity indicators that get used by HEIs may include ones formulated by the Delaware study (National Study of Instructional Costs and Productivity by the University of Delaware) [13-15] or they may be formulated by the HEI inhouse [16].

Differentiating between workload and productivity indicators

When comparing workload activities and productivity indicators, it becomes clear that not all workload activities get captured by productivity indicators/metrics that are usually used by HEIs. This is evident from Table 2.1 that lists the faculty workload activities that consume faculty time and shares potential indicators/metrics for productivity resulting from some of these activities. The table was inspired by another table about “Considerations for Faculty Workload Measurements and Metrics” by Park et al [17]. My goal in Table 2.1 is to capture as many workload activities as possible to be considered in examining faculty workload for various types of faculty in different disciplines, in various types of institutions that award various types of degrees, associate’s, bachelor’s, master’s, and doctoral. I also share in Table 2.1 common productivity indicators or metrics that are used by HEIs when they evaluate faculty productivity.

Table 2.1 Faculty workload activities and productivity indicators/metrics

Area	Workload activities	Common productivity metrics*
Teaching	• Teaching courses: preparation time for teaching, with variations in activities depending on class meeting duration, class size, type of teaching delivery (in-person, online, virtual, hybrid, synchronous, asynchronous), at one or more campuses • Role in the course: coordinator/leader role vs instructor • Teaching different courses vs sections of the same course in the term • Creating and teaching new courses • Repeating existing courses with reflecting and revising them • Developing master courses (i.e., developing, as the subject expert, standardized materials for a course to be taught by other faculty) • Teaching a pre-developed master course • Preparing and dismantling laboratories or studios • Preparing for teaching courses and learning activities • Designing and grading assignments and exams • Preparing rubrics for assessing student work • Printing exams (in absence of supportive staff) • Offering post-exams' meetings with students, individual or group • Providing time accommodations to individual students • Training and guiding teaching assistants (TAs) • Dedicating office hours for students • Adopting and using technology and innovative pedagogies, such as generative artificial intelligence (AI), open educational resources (OER), etc.	• Course credit hours • Course contact hours • Size of class** • Number of courses by type: undergraduate vs graduate, or honor vs non-honor, first-year experience vs other, etc. • Number of newly created courses • Number of developed master courses • Number of OER courses • Number of supervised TAs • Number of faculty who receive teaching honors, awards, and recognitions, internal and external • Ratios of all the above metrics to the number of full-time faculty or to faculty full-time equivalents (FTEs) for all faculty (full-time and part-time) • Ratio of student FTE to faculty FTE • Ratio of instructional cost to the number of course credit hours • Ratio of instructional cost to the number of course contact hours

(*Continued*)

Table 2.1 (Continued)

Area	• **Workload activities**	• **Common productivity metrics***
Clinical work	• Engaging in clinical supervision, instruction, and evaluation at clinical sites • Performing clinical duties serving patients • Planning staffing tasks • Supervising staff, preceptors, or other clinical educators • Clinical committee work • Writing or presenting (with preparation time) for clinical sites • Providing continuing education (CE) sessions • Working with assigned trainees • Teaching non-assigned trainees (students within various disciplines)	• Number of patients/beds serviced • Number of hours per week in service • Number of clinical committees • Number of clinical presentations or reports • Number of CE sessions • Number of assigned trainees and supervisees • Ratios of all the above metrics to the number of clinical full-time faculty or to faculty FTEs
Other teaching equivalencies: giving credit for various modes of teaching activities by converting the contact hours for these activities to equivalent credit hours for courses	• For library faculty: offering instructional and non-instructional activities • Teaching writing-intensive courses, general education courses, first-year seminars, honors courses, large-size classes, variations by course level, or courses with high demand on faculty • Teaching laboratory, studio, and hands on courses • Offering experiential teaching (internship, cooperative, undergraduate research experience, community engaged learning, study abroad, field work) with its associated design, supervision of students, and plans for rubrics and assessments • Developing a new program (major, minor, graduate program, certificate program, continuing education, etc.) • Coordinating or directing academic/residency/fellowship programs • Offering and planning interprofessional courses/experiences	• Same as those listed under teaching • For library faculty: report on the credit hour teaching equivalencies for their activities • If an HEI has pre-determined teaching equivalencies for any item on the list in the second column, then they report on the equivalent credit hours. Alternatively, they may create equivalencies or report on numbers of participants or occurrences • Ratios of all the above metrics to the number of full-time faculty or to faculty FTEs

(*Continued*)

Table 2.1 (Continued)

Area	Workload activities	Common productivity metrics*
	• Teaching in courses that are team-taught or co-taught • Teaching in courses that employ project/problem-based learning (PBL), case-based learning (CBL), team-based learning (TBL), course-based undergraduate research (CURE), or other teaching and learning approaches • Offering independent or directed studies Supervising student rotations of various types like clinical, research, teaching, or other • Supervising and mentoring undergraduate student capstone projects, honor thesis, and/or presentations • Supervising graduate students' pre-dissertation rotations • Supervising and mentoring graduate or professional students' thesis/dissertation (training, research, publications, presentations, guiding for submitting abstracts and participating in conferences) • Serving as a member or chair of graduate student qualifying exam committee • Serving as a member or chair of graduate student thesis/dissertation committee • Acting as preceptor for projects in a class taught by other faculty • Proctoring exams in large classrooms that need other faculty assistance	• Number of new programs (major, minor, graduate program, certificate program, etc.)
Research or scholarship	• Submitting research proposal and managing awarded grants and contracts • Preparing and generating publications, presentations, exhibitions, galleries, performances, concerts, creative works, software, productions, white papers, technical reports, etc. • Copyright or patent applications, and awarded copyrights or patents, and technology transfer activities	• Number of submitted research proposals (even if not funded, which is a common practice by teaching institutions) • Number and funding amounts of awarded grants and contracts • Number, quality, and type of publications

(*Continued*)

Table 2.1 (Continued)

Area	Workload activities	Common productivity metrics*
	• Working on ongoing unfunded projects • Checking literature and information sources to evaluate and synthesize knowledge to remain informed and formulate ideas • Determining research/scholarship objectives, designing research/scholarship-related work, analyzing and interpreting data, determining trends, exploring issues, planning products of research/scholarship, and discussing work with one's group members and collaborators • Networking and recruiting collaborators • Interacting and meeting with peer research collaborators • Pursuing approval by Institutional Review Board (IRB) for projects that involve human subjects and by Institutional Animal Care and Use Committee (IACUC) for projects that involve animals in teaching or research activities • Supervising and mentoring graduate students/undergraduate students, postdoctoral fellows/other trainees who are conducting research, writing, and presenting • Presiding over one's recurring group meetings to discuss research progress and plans • Recruiting, screening, and selecting graduate or undergraduate students, postdoctoral fellows, research employees, and other staff • Supervising research support employees (with associated activities such as training, mentorship, guidance, one-on-one meetings, group meetings, annual evaluations, handling conflict and personnel issues within the group, and supporting their growth and future hiring) • Generating work and research protocols and standard operating procedures (SOPs) to guide undergraduate and graduate students in research/scholarship within one's group	• Number of citations • Number and types of presentations • Number of creative products such as exhibitions, galleries, performances, concerts, software, productions, white papers, technical reports, etc. • Number of copyright or patent applications, and awarded copyrights or patents, and technology transfers • Number of received honors, awards, and recognitions, internal and external • Number of graduate students/undergraduate students/other trainees for research oversight and mentorship on research/scholarship and writing • Number of supervised research support employees • Ratios of all the above metrics to the number of full-time faculty • Years in rank • Ratios of each rank to the number of full-time faculty

(*Continued*)

Table 2.1 (Continued)

Area	Workload activities	Common productivity metrics*
	• Setting up one's research/scholarship laboratory/center/space, when newly hired or moving into new space • Ordering supplies and equipment, with requesting quotes, when newly hired or in absence of research and support staff	• Ratios of tenured faculty to non-tenured faculty and to the number of full-time faculty
Interacting with students	• Emailing students and meeting them during or outside office hours • Advising, supporting, and/or coaching students: assigned advisees at expected load, or above expected load • Faculty time depends on the complexity of the student advising model utilized by the institution • Guiding students in applications and interviews for their next job or graduate studies • Advising student organizations • Supporting living learning communities • Offering remediation for struggling students • Tutoring of students informally • Engaging in co-curricular or extra-curricular activities • Writing students' letters of recommendations • Using student early monitoring and intervention platforms to input or retrieve information about students	• Class size • Number of assigned advisees • Ratio of total number of advisees within a program to the number of full-time faculty or to faculty FTEs • Number of student organizations advised by faculty
Institutional service, and administrative or leadership roles	• Serving as member, chair, or secretary for department/school/shared governance/institutional committees • Serving on task forces and ad hoc committees • Serving on search committees for faculty, staff, and administrators • Serving as a voting delegate representing the department or institution at professional organizations or networks • Contributing to annual program assessments' efforts by the department	• Number of committees and any special service role (chair or secretary) • Number of administrative or leadership roles

(*Continued*)

Table 2.1 (Continued)

Area	Workload activities	Common productivity metrics*
	• Coordinating or contributing to self-study for accreditation or periodic program review • Participating in site visits for program review and specialized or institutional accreditation • Participating in department/school/university meetings, retreats, and mission-driven and strategic activities • Performing leadership or administrative duties (e.g. department/division chair, assistant/associate chair or dean, director/coordinator of specific centers or programs like faculty development, honors program, general education program, etc.) • Coordinating speaker seminar series • Moderating or hosting speakers for a series or events • Attending department/school/institution speaker events • Planning or contributing to planning events • Serving as member of admissions or interviewing committee of graduate or professional student applicants • Participating in open house days and events for recruiting and orienting students • Contributing to student recruitment and retention • Serving various institutional strategic initiatives • Attending commencement, convocation, white coat ceremonies, induction, awards, and any required events and ceremonies • Acting as a resource for new and transfer students • Participating in events for alumni and donors • Engaging in fundraising activities • Serving as a judge or organizer of events or competitions hosted by the institution	

(*Continued*)

Table 2.1 (Continued)

Area	Workload activities	Common productivity metrics*
Service to colleagues	• Serving as an officer or representative for the entity representing faculty (union, senate, association, assembly, etc.) • Mentoring faculty colleagues (formal and informal) • Conducting a peer or supervisor observation of classrooms • Providing feedback on draft publications, grant applications, and scholarly products • Convening a faculty writing group • Recruiting applicants for faculty and leadership positions through emails and conferences • Attending presentations by colleagues • Participating in events that recognize/award colleagues • Exhibiting collegiality	• Number of faculty representatives per unit serving faculty union. Senate, or equivalent, • Number of faculty mentors per unit • Number of assigned faculty mentees per unit • Ratio of mentors and mentees in unit to the number of full-time faculty
Service to the community	• Planning community engagement (including civic engagement), service-learning projects, and relevant scholarly work. The latter fits research/scholarship but not all institutions count it that way • Engaging with K-12 schools in relation to one's discipline • Engaging with other activities that are recognized by the institution as acceptable community service activities, as this varies from one institution to another • Consulting services that are acceptable by the institution	• Number of community-engaged projects • HEIs may request reporting on specific types of service that they value, e.g. serving as a board member within the community, service-learning projects, or other activities
Professional service	• Interacting with institutional public relations office in relation to interactions with media, government bodies, professional commissions, etc.	• Number of organizations served and type of service

(*Continued*)

Table 2.1 (Continued)

Area	Workload activities	Common productivity metrics*
	• Serving national or regional professional organizations, associations, journals, networks, advisory boards, editorial boards, accreditation agencies, conferences, workshops, etc. • Serving as a peer reviewer for manuscripts or grant applications (through grant study sections or other means) • Serving as an external reviewer for tenure and promotion applications • Serving as an external reviewer for academic programs or as a member of a visiting team for program review or accreditation visit	
Professional development and self-service	• Attending orientation for new faculty, or about new initiatives • Participating in institutional professional development and networking events • Participating in outside professional development events • Presenting at events by external professional organizations • Investing time and effort in one's own mentorship and networking • Planning and preparing for one's annual evaluation, promotion and tenure (learning the process, attending professional development events, connecting with colleagues, preparing dossiers) • Examining and reflecting on one's teaching evaluations and other measures for teaching performance	• Number of institutional professional development events attended • Number of external professional development events attended • Number of presentations at professional organizations' events
Uncategorized	• Providing emotional support and care work to assigned advisees • Advising, guiding, coaching, and providing emotional support and care work to unassigned students • Covering faculty shortage (e.g., due to illness, parental short-term leave, departure, or reassignment)	• Number of re-assigned teaching or teaching equivalent duties while covering faculty shortages, which some HEIs do not make a record of

(*Continued*)

Table 2.1 (Continued)

Area	Workload activities	Common productivity metrics*
	• Building relations with colleagues and students • Email interactions with colleagues and supervisors • Continue mentoring past students and alumni • Advocating for internal colleagues • Mentoring, coaching, and advocating for external colleagues • Email interactions with the outside community, e.g. vendors, membership or conference providers, etc. • Cleaning up unsolicited emails • Preparing students for their board exams in programs that require licensure • Pursuing or maintaining a profession-related certificate or license • Pursuing a terminal degree • Participating as subjects in research studies performed by colleagues • Serving as a member or chair of graduate student thesis/dissertation committee at another institution • Teaching courses at another institution as a part-time faculty • Engaging in invisible labor related to DEI and justice, not formally reported in faculty reviews, or related to various administrative tasks that faculty need to perform to support their teaching, research, and service	• Ratios of these metrics to the number of full-time faculty or to faculty FTEs

*The productivity metrics may be for individual faculty, departments, schools/colleges, or the whole institution, depending on what is being examined. They are the ones that can be readily available from offices of Institutional Research (IR) or from faculty themselves or their departments and may be used by institutions.

** Some HEIs modify credit hours awarded for a course based on the size of the course, i.e. the number of enrolled/registered students in the course. As an example, Pace University modifies load credits for courses with enrollment above 59 students, where a three credits course counts as six credits for enrollment between 60 to 90, and nine credits for enrollment between 91 and 120 [18]. This or other HEIs' formulas could serve as models for HEIs that do not have that distinction in crediting workload based on class size.

By examining Table 2.1, it is clear that the metrics used by HEIs to measure productivity are very specific. These metric measure faculty performance (specifically products to show from faculty work) in teaching, research, and service as individuals or within their units. The various faculty activities do not get measured at all, and the actual time spent by faculty on their various workload activities does not get captured by productivity metrics. This means that there are mismatches in measurements of workload activities (which do not get measured) and faculty productivity, which is usually measured using productivity metrics. If institutions focus on measuring productivity without giving credit for the actual workload, then one could imagine lack of uniformity and the existence of variations in workload between faculty members and potential problems resulting from invisibility, undervaluation of labor, and inequities; all of which could result in burnout, dissatisfaction, and adverse consequences [19, 20]. In addition to this mismatch, to gain better understanding of faculty time and its allocation to various activities, one needs to reflect on changes in pace over the years, especially with technology advancements, and how that impacted faculty time and the invisible labor performed by faculty.

Change in pace and evolving needs and their impact on faculty time

When one thinks back to times before 1980 about how we operated in academia, it is clear that things have changed. When faculty prepared for teaching, they used notebooks or papers, pens, and sometimes typewriters. In the classroom, they used chalk and chalkboards or markers and white boards, and sometimes overhead projectors or slides. For answering students' questions, faculty hanged around after class, or students went to see the faculty member in their office during their office hours or outside their office hours but during work hours. To remain current in knowledge for their research activities, faculty walked to the library, checked the new releases of journals, and sat down to skim through them and read some articles. When faculty engaged in literature searches, they went to the database section, lifted up large volumes and sat to search through them by key words, picked up large science citation indices, searched for citing articles, went to the stacks of journals, picked up the journals, sat to read articles, and so on. Occasionally while at the library, one ran into their colleagues and spent a little bit of time chatting and catching up. Submitting a journal manuscript used to consume a lot of time when faculty printed it on paper and provided figures on computer discs or paper then mailed them and waited to hear back. When faculty engaged in service, if there was no administrative assistance, meeting times were set using phone calls, reserving meeting rooms was done on paper, creating agendas and minutes was done using paper and photocopy machines, distributing them was done by internal mail, walking to mail pigeonholes, or in the meeting itself. Just interacting with colleagues or supervisors for meetings or discussions required phone calls or walking to others' offices. All these actions were time-consuming, but they slowed the pace of our lives as faculty members and that was considered part of meeting expectations of the job.

Compare this to how we operate in academia now, which has changed because of technology, the internet, and emails. Now for teaching, faculty use PowerPoint to prepare slides, recording

technologies to create modules for teaching and learning, artificial intelligence (AI) for creating an AI-guided interactive student assignment, learning management system (LMS) to upload course materials and design assessments, email to contact students and colleagues, and virtual meeting platforms to set up meetings with students and colleagues. Emails from students occur during various times of the day and night, which have been interfering with the boundaries between life and work [21]. For research knowledge, faculty use the internet to conduct an extensive literature search or to sign up to various journals to receive their content alerts in a timely fashion. Submitting a manuscript to a journal occurs much faster while one is seated at their desk. For engaging in service, one can use their computer to access systems or emails to set up meetings and book rooms as needed. One hardly uses internal mail these days, which has been replaced by heavy use of email to communicate with colleagues and students. In addition to email communications with students and internal and external colleagues, faculty often receive unsolicited emails from the external community leading to email overload [22].

Yes, technologies help faculty a lot and may improve their efficiency in completing tasks, but there are downsides. Learning these technologies and utilizing them is time-consuming on their own. Instead of gaining time for themselves, these improvements created time for additional tasks and increasing demands on faculty. As an example, modernization caused by email seems to have led to an expectation of replying to requested information through email quickly, and squeezing in more tasks per time unit than before the 1980s. Students send emails and expect immediate response, supervisors email requests and expect information to be provided shortly, colleagues text each other through various platforms and expect quick answers, etc. In addition to adding more work through email and digital platforms, checking and responding to emails distracts faculty from their work, interferes with their productivity, and increases stress unless they block time for work without checking email at all [23].

Stress that is caused by technology is called technostress. Although faculty reported low to moderate fatigue due to technology, the reality is that technostress has become an acceptable development that comes with the job [24]. Technostress has been reported in faculty, staff, and administrators in higher education in the USA [25]. It was found to significantly correlate inversely with psychological well-being for 301 basic education teachers in Peru [26] and to negatively impact faculty and their performance in public universities in China [27]. This technostress became more apparent recently during the COVID-19 pandemic [28].

As shared above, faculty workload has been evolving over time with faculty reporting slight increase in hours worked per week over the decades [3]. Reported back in the early 1980's, there have been excessive demands on faculty with mixed signals from administrators about faculty priorities and where to allocate their time [29]. This situation has become exacerbated in the current times with the additional demands and the HEIs' desires for prioritizing certain activities, especially with current enrollment challenges. Thus, there may be a mismatch between what faculty prefer to spend their time on and where their time actually gets allocated due to all the

external expectations, with higher mismatch for women resulting in inequities, which hinders career advancement and causes dissatisfaction [30, 31]. Berg and Seeber (2016) called on faculty to challenge the culture of speed in academia through their book "the slow professor" by slowing down; slow-teach, slow-knowledge and research, and slow-collegiality to help reduce overwork and stress and improve faculty well-being [32].

Expectations from faculty have changed over time with changes in technology resulting in increased workload, but expectations from faculty in their workload for teaching, research, and service did not change [33]. Table 2.1 lists some technology activities that consume faculty time, but that did not exist before the internet like using email, LMS, AI, OER, online classes, and virtual meetings. Table 2.1 also lists activities that are not technology-related and that either did not exist in the past or that became more prominent in current days resulting in heavier demands on faculty time and effort for service and professional development. Examples of these activities include interprofessional experiences (IPEs), service-learning/community engagement, study abroad, recruitment and retention activities to increase enrollment, and within institution faculty professional development activities. Yes, professional development and mentorship for faculty is a welcome evolution that was not adequate for faculty needs in the past; however, it added a time demand on faculty without giving any credit toward faculty workload for participation in these activities (some teaching-focused HEIs give credit for it instead of scholarship/research). If faculty time spent on professional development is credited in workload, then it naturally would lead to increased participation in events offered by faculty development centers.

All these job demands add time and effort pressure on faculty, so faculty become overworked, and this time pressure adds stress on them [34]. A Switzerland study found that faculty need to adjust their time based on various constraints from their institution that are beyond their control and that modernization tools caused faculty to lose the boundaries between time for work and non-work obligations, which added further to their stress [35]. Being overworked or working more actual hours than desired in academia, also referred to as working-time mismatch, is associated with stress, demoralization, adverse mental health, and job dissatisfaction [4, 36-38]. All these factors affect faculty well-being as shared in Chapter 4 about supporting the subjective dimension of faculty success, where information is shared about how to address faculty stress and their well-being.

Invisible labor

Invisible labor is a type of labor that is not noticed because it is either not reported, or if reported (in evaluations/reviews), is not recognized as having value or not assigned workload credit. It may be unassigned or assigned labor, meaning it is either voluntary or initiated by others, including students, colleagues, or supervisors. Being invisible prevents this kind of labor from being counted for faculty towards their promotion and tenure. It is an emotionally draining type of work, or just time-consuming service for tasks that are necessary for student success but not

usually expected from faculty; either way, it is burdensome work. The invisible labor in academia could include the following:

- Work that is not formally reported [39].
- Work that faculty report in their evaluation/review, but is not valued or recognized for promotion, tenure, or career advancement.
- Diversity, equity, and inclusion (DEI)-related work and care work that is emotionally draining (see below) [40-46].
- Various administrative and support tasks that are performed by most faculty members and that are often overlooked but are necessary to fulfill their needs in teaching, research, and service [47].
- Added work because of teaching a large class and without modifying credit load.
- Some of the workload activities listed in Table 2.1 fit invisible labor when not given credit for doing them, even if assigned by a supervisor. It is clear from the table that faculty time is spent on various activities that do not get measured. This may be because there is no venue to report on these activities, or the department or the HEI does not recognize, value, or collect information about them nor convert them to workload equivalencies.

It has been reported that more women, minoritized faculty, and faculty from low socioeconomic backgrounds spend more time on invisible labor, care work, teaching, advising, and service [44, 48-56], leading to an equity gap within the institution. This is usually accompanied by experiencing cultural taxation, which is "the obligation to show good citizenship toward the institution by serving its needs for ethnic representation on committees, or to demonstrate knowledge and commitment to a cultural group, which may even bring accolades to the institution but which is not usually rewarded by the institution on whose behalf the service was performed" [57]. This causes pressure on faculty of color to "serve as role models, mentors, even surrogate parents to minority students, and to meet every institutional need for ethnic representation" [43]. The invisible labor, especially experienced by faculty of color, may manifest in several ways including:

- Experiencing emotional labor while listening or being exposed to traumatic experiences, acting as a therapist, parent, supporter, or life coach, informally advising students, and assisting students' personal needs such as housing, food, and finances [40-43].
- Engaging in individualized teaching, teaching life skills, instructing on use of technology, preparing for joining the workforce, and providing individual accommodations as needed [58].
- Experiencing emotional labor by faculty who teach diversity courses [59].
- Providing support to minoritized students who approach the faculty member, but they are not in their classes and not assigned advisees of theirs.
- Providing emotional and career support to minoritized colleagues within their HEI and externally [44].
- Engaging in recruiting minoritized faculty without credit.

- Engaging in recruiting minoritized students without credit.
- Suffering from hypervisibility and tokenization that occur when minoritized faculty are expected to represent diversity in the HEI and being assigned to serve on too many committees to represent minoritized faculty or diversity [44, 60].
- Being referred to as the authority on all what is related to minoritized faculty and people of color.
- Countering actions and views about racism, discrimination, sexism, hate, microaggressions, injustices, wars, oppression, etc. [42, 44].

The invisible labor is not unique to core faculty only but maybe experienced by VITAL faculty as documented by a contingent Chicana faculty member [61]. There is a need to examine the invisible labor within the higher education sector and within each institution to ask how to make it count. Can it be converted to teaching, research, or service equivalencies? What metrics and indicators may be tailored to capture this invisible work to result in equity and fairness in faculty workloads? It is important to document any relevant changes in faculty handbooks to set new expectations.

Role of faculty affairs unit in crediting faculty workload

Faculty affairs units (FAUs), or faculty affairs practitioners, if no FAU exists within the HEI, could collaborate with academic departments (to consider disciplinary differences) and deans to generate tables similar to Table 2.1 for their HEI or for schools/departments within their HEI. The goal is to conduct a scan that assesses the status quo, identifies existing faculty workload activities, and determines which activities receive credit and which do not with special attention to the invisible labor. Most likely what gets credit or measured is what is usually recognized to lead to attaining promotion and tenure, while what is not given credit is considered not valued or desirable, although the majority of it is very important. If faculty workload activities do not receive workload credit, then their work becomes invisible and not valued, or mismatched with their preferred workload activities, leading to dissatisfaction, thus interfering with holistic faculty success. This is why crediting workload is an important subjective measure of faculty success.

Systems of weights and equivalencies for crediting workload

In order to improve recognition of all workload activities, a system of weights and equivalencies could be created with assigning weights to the various workload activities and allotting them workload equivalencies in teaching, research, service/administrative, advising, and mentoring. Some activities that on the surface may look similar could have different weights. For example, serving on a curriculum committee usually requires more time and effort than serving on other committees. Another example is in relation to committee service that is related to DEI and that may be emotionally draining; because of that, such service needs to have higher weight than others even if they consume equal time. There are some existing models for transparent faculty

workloads that could be utilized that assign time, weights, scores, tariffs, or equity comparisons to various workload activities [51, 62-68]. It is important to be transparent, consult faculty and faculty representation, and to consider disciplinary differences, individual circumstances, and career stages while designing a workload model [51, 65]. Here, my choice to share in detail for a workload-crediting model is the one stressing workload equity (or workload fairness), developed by the faculty workload and rewards project (FWRP). Its designers, Culpepper, O'Meara, Misra, and Jaeger share Case Study 2.1 about utilizing the FWRP.

A workload-crediting model for planning equitable workload for faculty

Definition of faculty workload equity is based on the equity-minded faculty workloads' framework that has been developed by the FWRP [51]. Faculty workload equity is defined as the allocation of workload activities to faculty based on fairness, respect, balance, transparency, equal opportunity for volunteering or selecting workload activities, assigning credit for invisible labor, acknowledging variations in weights of time-intensive activities by assigning appropriate workload credit, having clear expectations and rotations for workload activities, and recognizing distinct workload based on individualized faculty assets within specific structural, social, and cultural contexts while addressing potential biases and aiming at increasing valuation, satisfaction, belonging, retention, and success of faculty members.

A recent report about the FWRP work provided a department equity action plan (DEAP) for equitable workloads for faculty [51]. The report summarized findings about equity issues in faculty workload and shared the developed workload-crediting model with sample work to address inequities and imbalances in faculty workload with recommendations to disaggregate data by appointment type, rank, gender, race/ethnicity, or additional categories. That model is replicable by any department (or even a small to medium size school or whole institution) to help achieve equity in faculty workload. The model has six conditions to support equitable workload and provides samples for applying the model [51], which are briefly shared here. The six conditions [51] include the following:

Transparency [51] about who is doing what activities to provide equal opportunities without keeping them secret:

- Each department creates dashboards [51] for each area: teaching, research/scholarship, service, and other valued areas. For each area, a dashboard would categorize activities based on their expected time commitments, and report on who is doing what. The report includes sample dashboards in handout #1 in the report [51].
- Conduct a service audit [51] for planned activities in relation to each area for the next one to three years. A sample planning form for service in handout #2 [51] is shared so that after being filled by faculty, it gets used by the department chair and an advisory group to assign roles annually.

Clarity [51] about faculty expectations with set benchmarks, and sharing available service or leadership opportunities with their awarded compensation and/or workload release:

- Create guidelines for faculty expectations [51] that list, for each rank and for each full-time faculty category, the expectations for each area: teaching, research/scholarship, service, and other valued areas. A sample is provided in handout #3 in the report [51].
- Create guidelines for available service and assuming administrative or leadership roles [51] with clarity on which roles do not have compensation and/or workload releases, and which ones do, with stating clearly what is awarded; in addition to providing a process for expressing interest and selection with a system for rotating. A sample is provided in handout #4 in the report [51].

Credit [51] for workload to rebalance workload if faculty exceed or do not meet expectations in specific areas:

- Define for each rank and faculty category, and within each area of teaching, research/scholarship, service, and other valued areas, the expectations for standard performance, and based on that define what is considered as performance beyond standard expectations and performance that does not meet standard expectations [51]. Determine for a faculty member who performs beyond expectation in one area, which other areas to award releases. For example, if a faculty member's performance in research is beyond expectations, then they may be awarded course releases and/or service releases. In addition, determine for a faculty member whose performance does not meet standard expectations in one area, which other areas could have an increased workload. A sample is provided in handout #5 in the report [51].
- Create teaching credit swap systems [51], meaning determine teaching equivalencies, which entails giving course credit for various modes of teaching activities (see Table 2.1), or other non-teaching workload activities (some listed in Table 2.1 or under the section above about invisible labor). This allows for counting both the invisible labor and the visible extra labor toward teaching credits or service load. This reallocation to teaching credit allows meeting the teaching workload through these other activities that probably did not count at all. So, this enables rebalancing the workload to address high performance and invisible performance. A sample is provided in handout #6 in the report [51].

Norms [51] in assigning fair workload with equitable access to opportunities:

- Plan and agree on rotating teaching, service, positions, and other valued activities [51]. The rotating system would have some flexibility that accommodates the above teaching credit swap system, or that recognizes some faculty strengths in certain areas. Samples are provided in handouts #7 and #8 in the report [51].

Context [51]: recognize the context of individual faculty work as there are distinct strengths and interests for faculty members. These vary by the context of type of appointment, rank, career stage, having administrative roles, differential roles in supporting minoritized students, and the level of efforts on workload activities.

- Differentiate workloads [51] by making or negotiating arrangements that deviate from expectations to benefit the faculty member and their unit or HEI. A sample is provided in handout #9 in the report [51].
- Recognize assets who differ from norms by modifying and individualizing appointment, promotion, and tenure criteria for newly hired faculty who have additional responsibilities that differ from regularly hired faculty [51]. These responsibilities may include administrative/leadership roles, or types of scholarships that historically have not been valued by the institution due to its Eurocentric perspectives (see Chapter 4 about supporting the subjective dimension of faculty success). An example of such a role is shared in handout #10 [51] for the scholarship of community engagement. Although that type of scholarship falls within the Boyer's model of scholarship [69], some research-intensive HEIs historically may not have value it, so making an exception in the appointment letter helps address this point. Additional samples are provided in handout #10 in the report [51].

Accountability [51] to ensure that faculty are taking responsibility for and meeting their workload activities' obligations.

- Improve efficiencies: restructure and reduce committees after conducting an audit to determine number and purpose of committees, number and roles of committee members, frequency and duration of meetings, determine intensity level of time commitment to committee activities, and ensure that there are no redundancies in committees' purpose or work [51]. Committees are expected to report their work to their department. A sample process is provided in handout #11 in the report [51].
- Generate a statement of mutual expectations to spell out the obligations to one another and to the department, and that gets reflected upon to assess abiding by expectations, to include in evaluating faculty in annual or periodic reviews, and reviews for promotion and tenure [51]. A statement process is provided in handout #11 in the report [51].

The report ends with final guidance for creating a department equity action plan (DEAP) for equitable workloads for faculty through handout #13 [51]. As units or institutions implement the plan, they can reflect on it and modify it further to fit their needs. For applying this framework by departments, see Case Study 2.1.

Additional ideas for FAUs to help manage faculty workload

In addition to the above recommendations to improve recognition of all workload activities, there are additional actions that help keep faculty workload in check; these include the following suggestions:

- Consider awarding partial or full release from service, teaching, or research for a semester on a periodic and rotating basis for faculty to allow them to recharge and enhance their well-being, using a clear plan and conditions.
- Hire diverse staff to relieve faculty from the culturally taxing care work.
- Create pro-rata reduced-time shared faculty positions to give flexibility for faculty who need it [70, 71] and who could collaborate to make it successful [71]. In such cases, the FAU needs to ensure that the workload for these positions reflects their reduced time without unintentionally burdening them to become full-time without proper compensation and benefits.
- Hire support staff who have terminal degrees and expertise in writing grants and manuscripts who can help faculty in grant applications and generating publications or alternative scholarly written products.
- Develop and provide actions, funds, and resources to support faculty who are caregivers.
- When introducing new technologies for enhancing learning, the time and effort to learn and implement these technologies' needs to be valued and credited within the utilized workload-crediting model to release faculty time so they can engage in this work [72].
- Improve course efficiencies by looking into timing for course offerings, number of sections offered, course fill rates, course completion rates (by checking rates of grades of D, F, or W in the course), curricular complexities (prerequisites and course sequence), students' time to attain their degrees, and timing for creating course schedules for the next three to four years. All these actions could improve efficiencies and result in improving student outcomes and faculty workload.
- Recognize various types of scholarship, such as defined by Boyer's model of scholarship [69] so as to value broader scholarly activities by faculty within their workload [1], and to count toward their review, promotion, and tenure. This may require modifying faculty handbooks to include relevant information or at least acknowledge recognizing exceptions made in faculty appointment letters.
- Examine overload policy; that is the policy that regulates the number of credit hours that faculty may take on in addition to their regular teaching load in return for additional compensation. The administrators may feel that if faculty are overworked, then that will negatively impact the overall quality of teaching and learning. Faculty may feel that if their HEI pays them sufficient salary to begin with, then they would not have to resort to taking on additional courses to teach. Also, for institutions that do not allow it, faculty may have to teach part-time at other institutions or work part-time elsewhere. Faculty

compensation may need to be assessed along with the overload policy to reduce faculty stress.

A call for workload evolution

Besides creating models for crediting the invisible and undervalued faculty labor toward their workload, it is important to create checks on evolving faculty labor. This is a call for workload evolution; one expects evolving needs and priorities of the HEI depending on enrollment, supporting student success, and making an impact in the community and the world. Examples of evolving institutional needs and how faculty could help address them are covered in Chapter 6 about responding to challenges in higher education. At the same time evolving needs require evolving faculty workloads, and that is what needs to be adapted as a practice and to be shared at hiring: here are the priorities and expectations now, and if they change, your workload will be re-evaluated and adjusted to ensure your well-being while meeting evolving institutional expectations. Ideally, the HEI, with input from faculty representation, should design a model or set of practices that apply to all faculty for re-evaluating and adjusting workloads as the HEI evolves with time. The practice would need to be periodically re-evaluated, and that could be timed to follow revising or creating the institution's strategic plan.

Conclusion

Crediting faculty workload leads to faculty satisfaction and is a subjective aspect of faculty success. On the other hand, indicators for faculty performance in teaching, research/scholarship, service, and other areas are indicators for objective faculty success. Various studies on faculty success and academic career success have utilized both satisfaction with workload and performance metrics as indicators of faculty success. These studies reveal that some areas need more attention from the HEIs, so this chapter focused on practices by FAU(s) to improve crediting workload and to reconsider measures of faculty workload activities and productivity.

The FAU(s) could play an important role in recruiting stakeholders to use the above tools and models for examining the status of faculty workload and which activities receive or do not receive credit within the HEI. The FAU then could facilitate internal studies, conversations, and actions to address all revealed issues to award measurable credits to the various identified uncredited faculty workload activities, even if there is no positive product to show that fits the common productivity metrics. The importance of this is that it will give credit for faculty performance in teaching, research/scholarship, service, and other activities; enable realistic expectations for faculty time even if there is no final product to show; and it will make that work visible, valuable, and countable towards review, promotion, and tenure. This will make the work desirable by faculty and will result in improving faculty satisfaction. What is clearly missing from Table 2.1 is allocating time for self-care and well-being, which is not a common part of expected faculty workload activities, but that is essential for faculty vitality and for supporting holistic faculty

success, and should receive credit for faculty workload to enable it so that is addressed in Chapter 4 about supporting the subjective dimension of faculty success.

Each HEI, with the help of its FAU(s), needs to check changes over time in pace and workload activities for their faculty members due to changed institutional strategic initiatives. The purpose is to check if there is a need to adjust faculty workload expectations to account for the changes in pace and volume of work. It also would be helpful if HEIs routinely revisit their models for equivalencies and for crediting faculty workload every 7 to 10 years to make necessary adjustments in expectations and in what counts and how.

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Case Study 2.1: Addressing Faculty Workload Fairness: The Faculty Workload and Rewards Project

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Profile of initiative

Name of initiative: Faculty Workload and Rewards Project

Characteristics: The Faculty Workload and Rewards Project (FWRP) was a National Science Foundation (NSF) ADVANCE funded action research project that involved 53 academic departments at 20 colleges and universities, including large research-intensive universities, public regional universities, teaching-focused universities, and Historically Black Colleges and Universities (HBCUs)

Description

Overview of the problem and initiative

The unequal distribution of faculty workload, especially teaching and service, has significant consequences for faculty productivity, morale, advancement, and retention [1, 2], particularly for women and faculty of color [3].

Recognizing this as an important issue that impacts faculty success across institutional contexts; we led the FWRP, an NSF ADVANCE-funded action-research project designed to enhance

fairness in the way faculty workload is taken up, assigned, and rewarded [4]. The project has since spurred multiple adaptations at a wide range of institutions.

This case offers an approach to addressing faculty workload fairness based on the FWRP, as well as consultations with hundreds of academic leaders and units since the project ended.

Addressing workload fairness: Process and implementation

As an intervention, the FWRP operated at the department level, working with a committee of faculty representing ranks and appointment types in consultation with the department chair [5]. We recommend that workload reform mostly focuses at the department level and engages in this way for several reasons. First, although campus and college-level workload policies may shape the overall parameters in which faculty work is allocated/recognized, most decisions about workload (e.g., committee and teaching assignments) are determined and experienced at the unit level. Second, although academic leaders, including faculty affairs personnel, may be concerned with, and particularly attentive to, workload issues, getting faculty buy-in for workload reform is critical for ensuring that change sticks. Third, a single faculty member or a single department chair should not be responsible for addressing all workload fairness issues; rather, a more collective approach is needed. Including faculty from different ranks further assures that multiple perspectives on workload inform change efforts.

Based on our work with 53 academic departments, we recommend that departments address faculty workload using the following iterative process.

1. *Assess the current state*

   We have come to understand that the context in which faculty workload reform occurs varies greatly. On one end of the spectrum are departments where there is no transparency or clarity about the kinds of faculty work that counts in workload assignments, how workload assignments are made, or how credit can be received. On the other end of the spectrum, some departments operate in contexts where complex workload formulas make it very transparent and clear what counts (and what does not) and how workload assignments are being made, but offer very little flexibility to recognize a multitude of faculty contributions (especially invisible labor). Some departments may fall somewhere in middle.

   For these reasons, we suggest that departments begin by taking measure of the context in which workload reform is being pursued. For example, departments should consider how changes in faculty size or student enrollment or teaching modality have shifted workloads; the external parameters, such as campus policies and collective bargaining agreements, that need to be incorporated into departmental approaches; and the formal and informal processes that are being used to determine workload.

2. Leverage data to understand and shape workload decisions

The next step is to use data to understand how workload within the department is currently distributed. Ideally, departments can leverage data sources that already exist (e.g., faculty activities reporting, annual/merit review, institutional data) and turn them into aggregate-level work activity dashboards [6] that show, for example, the average number of students advised, committees served, courses taught, by rank/appointment type. Dashboards are helpful for seeing the breadth of faculty work, making invisible work visible, and may help generate buy-in for change.

However, departments can encounter challenges in creating and/or maintaining a dashboard. Some departments may not be able to access or locate data easily. Thus, before beginning this effort, a department will want to carefully consider the data sources that are/are not available, and how much time/effort will be needed to create and maintain a dashboard. Furthermore, in some departments, the process of collecting data can become point of contention/resistance that undermines change efforts (e.g., trying to generate department consensus about what activities need to be, or can be, quantified).

It is important to remember at this stage that reviewing data and/or creating a dashboard is intended to be a ***tool*** that helps departments identify and monitor workload issues (e.g., distribution of committee assignments or number of advisees); having the data or creating a dashboard is not, in and of itself, likely to enhance workload fairness. Based on this, we recommend that departments focus their data efforts – whether it is in the form of a dashboard or a more general review of data that is already available – on understanding one or two key department areas/issues (e.g., service – number of committees, committees by effort or advising – number of committees, number of committees chaired), rather than trying to understand and quantify every single aspect of faculty work that contributes to workload.

3. Identify workload fairness issues

Next, departments should engage in collective sensemaking to identify the areas for reform (e.g., departmental service; teaching loads). This sensemaking typically involves coming together as a department, ideally to review aggregate data and create shared meaning. However, even without data, the department can engage in a conversation, or series of conversations, to determine key areas where the department can agree that change is needed. This can be a challenging discussion, but it can also be an opportunity for department members to identify where their goals align.

As a result of this conversation, several issues may emerge. To help guide this discussion and determine priorities, departments should consider how to identify issues that can be addressed now, with small changes (e.g., changes to the way advisees are assigned) as compared to issues that may require more effort and/or resources (e.g., differentiated workload policies).

Departments should prioritize which issues to begin with, rather than trying to make multiple changes at once – a strategy that can lead departments to become overwhelmed and give up.

4. Identify and implement strategies

Once the department has determined the issue that it wants to address, it needs to decide which strategies (i.e., policies, practices) to put in place [7]. Most departments, particularly those in contexts where there has been little guidance around workload, focus first on creating faculty work expectations by appointment type and career stage. Creating clarity around baseline expectations then becomes the foundation on which more refined policies can be developed (e.g., credit systems).

It is important to note that a single policy or practice is not likely to fix every workload issue, nor is every policy or practice suitable for every department. For example, although differentiated workload policies (e.g., workload arrangements that allow for different percentages of effort to be distributed across the areas of teaching, service, and research/scholarship depending on faculty context) have been of great interest to many departments with whom we have worked, campus policies (including collective bargaining agreements) may constrain the extent to which such approaches can be pursued. At the same time, there may be changes to practices or processes that can be altered even within these existing structures (e.g., rotating high effort service roles among department faculty). It is important that departments are realistic about what can, and cannot, be addressed.

5. Monitor progress and iterate

Even after moving through this process, it is unlikely that all faculty will feel ***all*** of their work is appropriately credited in their department or institution. However, if department faculty can point to policies and practices that have been implemented to support and monitor for fairness, if they feel some of the critical mission work they do is better recognized and fits into the workload system, and/or if they feel there is at least a moderate level of transparency and clarity after putting reforms in place, those are examples of progress that generate more interest in continuing to change. Thus, it is important that departments continue to monitor workload issues and make changes to their approach, as well as taking on additional issues the department has identified as important to address. Investing in creating and revising workload dashboards helps enable this monitoring. Moreover, reform processes that thoughtfully engage the collective thinking of the department can engender greater goodwill for change moving forward.

Outcomes of the FWRP

Our work with departments and academic leaders over the last several years has shown that departments that intentionally, strategically, and thoughtfully engage in workload reform can experience the following benefits, all of which relate to pursuing a culture of faculty success:

Increasing satisfaction with workload

Research shows that faculty members tend to be more satisfied with their workload when their department has in place conditions such as transparency and clarity [8]. Putting in place work activity dashboards and establishing clear expectations for faculty work through workload policies – things that help cement transparency and clarify – can therefore strengthen a unit's ability to increase workload satisfaction.

Increasing readiness for change

Often there is trepidation among faculty and academic leaders about addressing workload reform, citing concerns about creating more administrative work, navigating faculty resistance, or generally opening a can of worms that could not be closed [9]. Many faculty members may also be disillusioned with efforts to make change. However, the results from the FWRP showed that participating in a collaborative, data-driven workload reform process can actually increase faculty efficacy, or what we called action-readiness, for change [10]. Faculty members in departments that participated in the FWRP were more likely to report, for instance, that they knew concrete steps to take to ensure workload fairness.

Changing collective norms

Ultimately, making faculty workloads fairer requires a shift in norms – moving away from the mentality of "just saying no" to service and/or teaching [11] and towards one where all department members contribute, albeit in different ways. Results from the FWRP showed some evidence of this collective norm change, with faculty members in participating departments indicating that they could use data to ensure the teaching and campus service burden is shared by all and that they could work with colleagues to tackle workload issues.

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