



TIAA-CREF Institute

Flexible Workplace Agreements: Enabling Higher Education's Strategic Advantage

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About this Research

American higher education is under intense pressure to lower costs and increase efficiencies and productivity. The most critical input to the work of knowledge creation and dissemination by colleges and universities is the faculty. Likewise, initiatives aiming to move the needle on institutional outcomes inevitably will need to engage the faculty in its many forms—tenure and tenure-track, full-time nontenure track, part-time contingent, etc.

To help campus leaders consider how best to leverage their academic workforce, the TIAA-CREF Institute invited this work by KerryAnn O’Meara. She argues that the ability to forge flexible workplace agreements with its faculty is an oft-hidden and under-utilized strategic advantage for colleges and universities. O’Meara cites research drawing connections between flexible workforce policies and increased productivity, as well as the positive effects such policies can have on building a more diverse workforce. She also shares specific examples of flexible workforce agreements for higher education leaders to consider implementing on their own campuses.

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Executive Summary

In the midst of the many constraints facing higher education today there is a largely hidden resource: that is, workplace flexibility. Flexibility has been, and can be, a strategic advantage for higher education. Unlike some organizations that have more fixed constraints on what they deliver and how they deliver it, higher education institutions have leeway to reconsider the structures and mechanisms by which they follow through on their mission. Institutions can consider more ways to engage faculty in work matched to their talents that also support institutional financial well-being and diverse missions. At the same time, faculty members need more ways to structure their work to meet the changing realities of their lives.

This paper provides examples of colleges and universities that have added flexibility in faculty time to advancement, terms of advancement, workload, and the nature of appointments, and discusses old assumptions that are being rethought in order to craft new possibilities. Although there is limited research on the long-term outcomes of these flexible organizational practices, evidence suggests flexible policies like these foster improved (a) inclusion and full participation of diverse faculty; (b) efficiency as institutional needs and individual talents are matched; (c) organizational commitment and productivity; and (d) perception of fair work environment.

When institutions create flexible policies such as those described herein, and enter into shared agreements with faculty, they provide the kinds of resources that motivation research shows are most valued by today's workers. Such reforms can result in mutual satisfaction for faculty members and their institutions by allowing both to achieve their goals.

Key Take-Aways

- Unlike organizations with fixed external and structural constraints on the structures and mechanisms by which they deliver their services and raise revenue, higher education institutions potentially have more leeway to reconsider the structures and mechanisms by which they enact their missions.
- Creating flexible organizational practices requires rethinking old assumptions based on a one-size-fits-all approach.
- Faculty workforce flexibilities are emerging with a number of institutions adding options in faculty time to advancement, terms of advancement, workload, and the nature of appointments.
- Although there is limited research on the long-term outcomes of these flexible organizational practices, evidence to date suggests that flexible policies foster improved inclusion of diverse faculty, increased efficiency as institutional needs and individual talents are matched, greater organizational commitment and productivity, and enhanced perceptions of a fair work environment.

In the midst of the many constraints facing higher education today, there is a largely hidden resource available to help achieve shared institutional and faculty goals: that is, workplace flexibility.

This paper highlights four kinds of flexible work practices—affecting faculty time to advancement; terms of advancement; workload; and the nature of appointments (part- versus full-time)—and offers examples of colleges and universities that have implemented such practices. Each section considers standard assumptions being rethought in order to craft new possibilities. Flexible arrangements not yet prevalent in higher education are discussed as well. At the end of the paper consideration is given to important factors to keep in mind when putting these organizational work practices in place so as to avoid backlash and resistance, including clear communication from leaders, developing consensus, implementing with transparency, and ensuring accountability.

How these new organizational practices are implemented is important because producing greater flexibility in faculty appointments, advancements, and rewards can help to accomplish four goals at the same time: (a) greater inclusion of diverse faculty; (b) greater efficiency as institutional needs and individual talents are matched; (c) stronger motivation, organizational commitment and productivity; and (d) increased perceptions of a fair work environment among faculty.

Faced with decreasing federal and state funding for higher education, institutions of higher education are continually being asked to do more with less. Many tenure-track faculty report working 54 to 60 hours per week (Link, Swan & Bozeman, 2008; Ziker, 2014) and feel overloaded, as there has been a decrease in new faculty positions and more administrative work shifted their way. At the same time, some state legislators have framed faculty workload as the main reason for rising higher education costs, arguing that if faculty in all institutional types teach more undergraduate classes, costs will go down (e.g. see North Carolina and Wisconsin efforts; Jaschik, 2015; Will, 2015). However, this is an over-simplification of the relationship between faculty work and higher education costs—which have risen for many reasons, including higher administrative costs, a rise in the percent of Americans who enroll in higher education institutions, and a decrease in state appropriations (Ehrenberg, 2002). With the increase in dual career households, more faculty balance work and life priorities, including taking care of children and parents. As in many other professional careers, this can leave faculty feeling like they have to work all of the time, and their work is never “enough” (Miller, 2015; Sangaramoorthy, 2015).

All of these contexts suggest that both institutions and their faculty need more options. Faculty need more ways to structure their work to meet the changing realities of their lives. Institutions need more ways to engage faculty in work that they do well, fulfill distinct missions of the institution, and support the financial well-being of the campus.

Flexibility has been, and can be, a critical strategic advantage for institutions and faculty alike. Unlike other organizations that have more fixed constraints on what they deliver and how they deliver it, higher education institutions enjoy leeway to reconsider the structures and mechanisms by which they follow through on their mission. This is partially due to the fact that higher education institutions, like many non-profits and government agencies, spend a significant amount of their resources on personnel. How higher education recruits, retains and advances personnel is more open to reform than in organizations where technology or the social, legal or political context has not made change as feasible.

Many organizations have limited options for changing course to achieve financial well-being when faced with fixed or rising costs, and limited opportunities to raise additional revenue. They may find that laying people off or reducing services are their only options. For example, K-12 public schools, like colleges and universities, spend the majority of their budget on personnel. When state or local school district funding decreases and the costs of employee benefits increases, they more often need to cut teachers or services. It is true that some states are able to use lottery funds and/or draw on federal or philanthropic funds for support, but many local economic realities (e.g. property taxes as the funding mechanism for public schools in most states, and state and federal laws) prohibit creative financing or seeking out a more diverse portfolio of funding sources. Colleges and universities that face reduced revenues typically have a much larger array of options to consider: For example, they can (in some cases) raise tuition, increase fundraising, seek more external funding, provide more continuing education or certificate programs, offer early-retirement options, furlough employees, freeze hiring, consolidate programs, increase enrollment, or increase tuition for highly desired majors. Despite the often-cited adage that higher education institutions are slow to change, many higher education institutions have more ways they can transform and adapt to meet new challenges than do other types of organizations, and many have done so.

Likewise, flexibility is a key motivator for faculty (Gappa, Austin & Trice, 2007; Kezar & Maxey, 2015) as it is for many professionals. Daniel Pink describes “the ingredients of genuine motivation as autonomy, mastery, and purpose” (Pink, 2009, p. 46). He observes that some of the most successful organizations motivate employees not with money, but with working conditions that offer flexibility in time and tasks.

The United States Office of Personnel Management's Office of Diversity and Inclusion (2014) has developed a way to measure inclusion that it terms the New Inclusion Quotient (the New IQ). They assess five inclusive habits that all U.S. government agencies and offices are intended to foster in the workplace. One of these factors is a "supportive" work environment, which includes flexible work arrangements for employees. The federal government has been a leader in recent years in facilitating working from home, flex time, and other flexible options for its employees.

Although academic reward systems and faculty appointments shape and constrain discretion, there is still much flexibility embedded in the everyday work that faculty do. For example, faculty members who find their teaching methods are not working effectively can "flip the classroom", changing how they go about interacting with students. A faculty member who realizes that industry and government are more interested in one part of their research than another can decide to focus on the area more likely to attract support.

Recognizing the possibilities of built-in flexibility is important in higher education today. Many institutions, for example, may not be able to recruit away "faculty stars" from other institutions with larger labs, higher salaries, and other financial resources. Yet if they create flexible policies such as those described here, and enter into shared agreements with faculty, they provide the type of work environment that motivation research shows us are most valued by today's workers. Such reforms can result in mutual satisfaction for faculty members and their institutions by allowing them both to achieve their goals.

One way to think about the reforms discussed in this paper are workplace "systems" improvements. System theorists such as Peter Senge (1990), Edward Deming (2000), and colleagues have long maintained that "85% of a worker's performance is determined by the system they work within and the remaining 15% by their individual effort. The conclusion is unmistakable. Improving organizational performance must address the work system as well as the individual worker (Barnes & Van Wormer, 2003)." Applying this concept to the higher education faculty workplace, Bland et al (2006) found that the system surrounding tenure track positions seemed to create greater productivity among faculty than the system around non-tenure track faculty. Authors found that when comparing full-time tenure track and non-tenure track faculty in doctoral and research universities, faculty on tenure appointments were significantly more productive in research, more productive in education, more committed to their positions, and worked about four more hours each week (the equivalent of one additional month of work each year) (Bland et al., 2006, p. 115). Bland et al. (2006) point out however, that it was not tenure itself that seemed to create different

levels of productivity, but different systems of recruitment, socialization, evaluation, resources, support, and opportunity around tenure.

Likewise, in this paper, I consider reforms to workplace systems that allow for greater flexibility. Emerging research on flexibility programs in business suggests many benefits to organizations that build such programs into their core activities and way of working. For example, Schawbel (2015) studied employer perceptions of outcomes associated with implementation of workplace flexibility programs. Schawbel (2015) found improved employee satisfaction, productivity, retained talent, and benefits to recruitment reported from businesses that implemented these programs. Meister (2014) notes that both AETNA and American Express have documented significant advantages from implementing their workplace flexibility programs, and that their newest and most talented recruits expect flexibility programs as part of their employment. Although the research is still emerging, at the end of this paper, I consider potential benefits of flexibility reforms to faculty and higher education institutions, especially as they relate to reduced faculty role conflict and stress, increased sense of inclusion, and enhanced sense of procedural and distributive justice.

Flexible Workplace Practices: Assumptions, Considerations, Possibilities and Examples

Old assumptions are being rethought in order to craft new possibilities for the faculty workplace. Those old assumptions and new possibilities are described below, and illustrated via examples of four types of flexible workplace agreements that some higher education institutions are putting in place today. These examples are not meant to be exhaustive, but rather illustrative of the different kinds of assumptions being challenged with regard to the terms, structure, cultures and reward systems governing faculty work.

1. Flexibility in the nature of appointments and movement between appointment types

Old Assumption: All career faculty members should be employed full-time.

New Considerations: Career faculty may wish to move into part-time faculty positions for family or life-course reasons; they may also wish to move back and forth between part-time and full-time appointments. Allowing flexibility in moving between full-time and part-time positions can help recruit and retain talent, and fosters organizational commitment and morale.

Possibility: Create appointment types that allow career faculty to serve part-time during agreed upon periods of time.

Research has shown both Generation X and Millennial academic mothers and fathers are more interested than previous generations in balancing work and life goals. Many such faculty are looking for ways to take specific periods of time away from work, or to work part-time for a period while their children are young or other family members need care (Lester & Sallee, 2009). Also, as baby boomer faculty retire, many do not want to leave their posts completely, but while they still have much to contribute to their institutions, they often are left with all-or-nothing employment options before retirement (Flaherty, 2013). Thus a good number of both new and more senior full-time faculty are looking for careers that are not full-time. It is important to emphasize that such career faculty do not want to just teach a class here or there or become adjuncts; rather, they aim to maintain their identity and status as career faculty, but not at a full-time pace.

Over the last 20 years, many higher education institutions and state systems have put work-life policies and programs in place to support academic parents who want to work part-time and faculty looking for phased retirement (ACE, 2015; Lester & Sallee, 2009). Fueled and supported by such catalysts as the National Science Foundation ADVANCE program, Alfred P. Sloan Foundation, American Association of University Professors, and the American Council on Education, institutions have implemented part-time tenure-track positions and phased retirement programs and policies.

In response to the frequent difficulties that faculty, especially early-career female faculty, have faced requesting and receiving parental leave, Drago & Williams (2000) proposed the creation of half-time tenure track positions. They argued that current practices requiring all faculty members to work full-time disproportionately impacts the advancement of women faculty, many of whom could be retained if allowed greater flexibility to go part-time for child-rearing. Drago and Williams argued, “the solution is to redefine the ideal worker in academia, by offering proportional pay, benefits, and advancement for part-time work. This idea boils down to a part-time tenure track” (Drago & Williams, 2000, p. 47).

Part-time tenure track includes reducing the productivity requirements for faculty members and lengthening the time allowed for faculty working part-time to reach stipulated productivity requirements. Today, “there are more than 8,000 individuals working in the United States on PTTT [part-time tenure track] appointments.” (Herbers, 2014, 14) In these half-time tenure track arrangements, the faculty member’s tenure clock runs on half-time. In other words, if a faculty member requests half-time status for two years, then her or his tenure clock would be extended for one year during that time.

The University of California Berkeley developed a half-time tenure track option but learned that there are hurdles that limit faculty taking advantage of such programs. The Berkeley program, initially funded by the Alfred P. Sloan Foundation, allows faculty members to enter into a Memorandum of Understanding with the university in order to change from full-time to part-time status (temporarily or permanently) to accommodate family needs. In addition, the University of California 2006 Policy on Appointment and Promotion – Professor Series (APM-220) notes “teaching and service expectations for part-time appointees shall be pro-rated in accordance with the percentage of time of the appointment” (Appendix B -1). In addition, UC Berkeley policy states: “Assistant professors who are new parents with substantial caregiving responsibilities can extend the tenure clock for one year per birth/adoption event (for a maximum of two years during the probationary period).” (http://www.ucop.edu/academic-personnel-programs/_files/apm/apm-760.pdf).

Early implementation of UC Berkeley work-life policies revealed barriers to participation (Frasch, Stacy, Mason, Page-Medrich & Goulden, 2009; Mason, Wolfinger & Goulden, 2013). Although the University of California made the part-time tenure track option available to professors in 1985, Mason & Stacy’s (2003) *Family Friendly Package for Ladder-Rank Faculty at the University of California* found that only two professors had taken advantage of it prior to their report’s publication in 2003. UC Berkeley realized they needed to increase awareness of existing policies and provide support for their use. They put new efforts in place to make this happen through a program called the UC Family Friendly Edge Program (Mason et al, 2013). Subsequently, they saw a major increase in use of work-life policies and improved work-life climate. Mason, Wolfinger & Goulden (2013) report that because of subsequent efforts: “Women assistant professors are more than twice as likely to have children as they were in 2003. Faculty are making use of accommodations for childbirth at an unprecedented rate (p. 7).”

Studies at some institutions that have created part-time tenure track options have found them under-used because of: (a) fear that academic parents will not be considered serious about their careers and will lose career momentum; and (b) the inability to sustain a 50% pay-cut, even for just a year, because of the high cost of living (Lester & Sallee, 2009). For those who can afford to work part-time, this arrangement offers a way for institutions to retain talented faculty, and for faculty to balance work and parenting roles at critical points in their lives. It perhaps has the best chance of increased use when both men and women utilize the option in greater numbers and subsequently achieve successful progression through the tenure ranks after taking advantage of the part-time tenure track. This will reduce faculty

perception that such a program shapes a “mommy track” and is a major risk to career advancement.

Phased retirement policies illustrate another type of part-time tenure track work arrangement, from which lessons may be learned to better structure options for flexibility. Phased retirement, according to Phelps (2010) involves reducing professors’ teaching loads and prorating their salaries in return for their tenure commitment waiver at a future date and time. As Beckman (2003) notes, many mandatory retirement policies for university faculty were abolished in 1994. Fendrich (2014, p. 4) explains the consequences of this change:

The average age for all tenured professors nationwide is now approaching 55 and creeping upward: the number of professors 65 and older more than doubled between 2000 and 2011. In spite of those numbers...three quarters of professors between 49 and 67 say they will either delay retirement past age 65 or—gasp!—never retire at all.

The increasing number of faculty members delaying retirement has impacted the diversity of faculty members at many universities. Fendrich (2014, p. 6) cites Cornell University, the University of Virginia, the University of Texas at Austin, Duke University, and the University of North Carolina at Chapel Hill as institutions of higher education in which more than 25 percent of faculty members are above the age of 60. In responding to the change in demographics and in an effort to negotiate the amount of time faculty members stay on staff, many universities have begun offering phased retirement plans. Phelps (2010) suggests that such a plan allows faculty members to test-drive retirement, and Baldwin and Zeig (2013, p. 1) note that phased retirement plans are also beneficial to institutions: “colleges and universities should think of late-career professors [faculty who have served for at least 20 years and who are 55 or older] as distinctive assets that can be utilized in diverse ways to the benefit of their institution and its various stakeholders—students, junior colleagues, alumni and administrators”. One such mutually beneficial aspect, according to Phelps (2010), includes a university being able to call upon professors’ expertise to teach on a per-course basis, an arrangement that provides professors with an opportunity to gradually transition into retirement while simultaneously helping their university meet its needs. Baldwin and Zeig (2013) highlight additional possible advantages of phased retirement, including mentorship opportunities for new faculty members, as well as community involvement through consulting partnerships or enrichment courses.

The University of North Carolina offers its faculty members a phased retirement plan designed to help ease faculty members’ transition into retirement. The UNC Phased Retirement Program is voluntary and can be enacted after a full-time tenured faculty member (eligible to receive retirement benefits and with at least five years of service at UNC) enters into a mutual written agreement with the employing institution. Under this arrangement, the faculty member receives fifty percent (50%) of their full-time salary, and their sick leave and vacation time, for up to five years (University of North Carolina, 4). Additionally, the faculty member will maintain at the same “professorial rank and the full range of responsibilities, rights, and general benefits associated with it” (University of North Carolina, p. 5). Guidelines for the UNC phased retirement program note that faculty who participate in the program give up tenure, terminate their full-time job, and “contract” with the institution for half time or equivalent service for a period of time. Presumably if a faculty member taught six courses a year before entering into this new arrangement they would then teach three. However, faculty negotiate individually with their departments to determine their specific teaching duties under the new work plan. The half-time teaching load must be agreed upon by both parties (the faculty member and department).

In his workplace flexibility case study, Giglio (2015) notes that 524 faculty members at UNC have taken advantage of the phased retirement program since its full-scale implementation in 2001. Given the increase in full-time non-tenure track faculty in higher education, it is likely we will see more phased retirement and part-time options offered to non-tenure track faculty. Activists organizing contracts and representing non-tenure track faculty might consider ways to negotiate parallel programs in new faculty contracts and agreements.

There are more possibilities for adding flexibility to the transition between part-time and full-time positions than is being realized. For example, only a few institutions have attempted job sharing, where two people share one full-time position and salary. Typically in such cases, each faculty member receives the benefits of someone who is 50% FTE, and many universities offer full benefit options to faculty in 50% or greater FTE positions. Likewise, most institutions have artificial barriers (e.g. cultural norms preferring external candidates over internal nontenure-track faculty) that prevent faculty who are working part-time or in lecturer roles from moving into full-time tenure track roles.

2. Flexibility in terms of advancement

Old Assumptions: All career faculty should be advanced on the same set of criteria with standard requirements. These criteria assume the same level of productivity and quality in each required area of work (teaching, research and service). Each faculty member has equal ability to align their work with these standards and advance.

New Considerations: All career faculty may not need to be advanced on the same criteria with the same requirements. Institutions might benefit from career faculty that emphasize one area of work more than another. Faculty may choose to emphasize one area of work based on their talents, institutional needs, and opportunity.

Possibility: Create different options for advancement that allow faculty to emphasize different kinds of work for identified periods of time. Also, build mechanisms inside reward systems that acknowledge exemplary performance in all areas of faculty work and allow them to count and be recognized for advancement.

One important innovation, suggested by Ernest Boyer 25 years ago in *Scholarship Reconsidered*, is creativity contracts, or individualized work agreements. Kansas State University (KSU) has one of the best documented examples. In 1988, several KSU female professors expressed their desire to have “more explicit standards” for evaluating their performance (Clegg & Esping, 2005). They were concerned that they were being evaluated based on different standards than their male counterparts and that their potential for promotion and tenure might be negatively impacted by the lack of explicit standards. Further, faculty members who were exceptional at teaching were not being rewarded as often or through as clear a process as faculty members with achievements in research. Responding to these concerns, KSU began to develop a new policy in 1990 under which faculty members would meet with their department chair at the beginning of every academic year to develop “individualized agreements” that would make the best use of each individual faculty member’s strengths, as well as ensure that department work needs were met (Clegg & Esping, 2005). Rather than stipulate departmental standards for time allotted to research, teaching and service, the faculty member and the department chair would develop mutually agreed upon performance standards that would be “specific and unique to the individual” and serve as the basis of the individualized assignment (Clegg & Esping, 2005, p. 170). During these annual meetings, the faculty member and their department chair would also work collaboratively to evaluate whether or not the professional goals stipulated during the previous year’s meeting and in the faculty member’s work plan were met. If the faculty member did not achieve those goals, the faculty member and the department chair would

then create a plan for remedying any problem areas (Clegg & Esping, 2005).

In addition, in response to faculty complaints about the lack of credit for teaching, KSU’s provost and college deans encouraged all departments to review their practices for evaluating teaching and to incorporate the “scholarship of teaching” as an integral component of faculty evaluations. Clegg & Esping (2005) note that KSU established the University Chair for Distinguished Teaching Scholars, which recognizes the importance of teaching. Faculty members awarded the honor are appointed to a half-time position for one academic year to focus on teaching and the scholarship of teaching (while maintaining their other, reduced duties the other half-time). Awardees permanently retain the title of University Distinguished Teaching Scholar.

To evaluate the effectiveness of the individualized faculty assignments at Kansas State University, Clegg & Esping (2005) interviewed all college deans, department heads, and the university provost individually and also requested faculty members in all departments to participate in an anonymous online survey. They found that “nearly 90 percent of all department evaluation documents [were revised to] mention flexibility in the allocation of time and talent, one way or another,” and a few select departments had even amended their evaluation materials so that faculty members could receive credit for research on teaching in their fields (173). Overall, they found faculty members were generally supportive of the individualized arrangements. Furthermore, the term *scholarship* broadened in common use on campus to include research, teaching and service components, which Clegg & Esping (2005) attribute to the campus-wide discussions about flexible/individualized work arrangements. There was a consensus that teaching had come to be viewed with greater appreciation and given more weight as a component of scholarship—but these results were not universal. As of 2005, some departments had not fully embraced the changes or institutionalized them (Clegg & Esping, 2005). The lack of universal implementation, according to Clegg & Esping (2005), was the result of department member’s varying levels of buy-in to the benefits of implementing flexible workload arrangements, and changes in department leadership. However, the program has continued and is outlined in the 2014 *KSU Faculty Handbook Section C: Faculty Identity, Employment, Tenure*.

Overall, Clegg & Esping (2005) observe that implementation of individualized agreements requires regular, ongoing communication between and collaboration among faculty members and departmental administrators. Additionally, the individualized agreements must be honored in all parts of the faculty members’ reward system process, from annual merit reviews through promotion and tenure.

Another innovative example can be found at University of California Davis. UC Davis uses a STEP system that incorporates defined advancement increments for salary increases within ranks (see <https://academicaffairs.ucdavis.edu/policies/step-plus/index.html>). The STEP system is currently being revised to include a “STEP Plus system,” which stipulates 0.5-step accelerations for outstanding teaching or service. The system allows UC Davis professors to receive advancement for exemplary service or teaching as noted in the following excerpt from the new policy: “...a larger-than-normal, 1.5-step advancement requires a strong record with outstanding achievement in at least one area of review across research or creative work, teaching, and service.”

This means that a faculty member who has spent the past year taking on the additional task of recruiting new colleagues to her college, leading accreditation preparations, or designing a new masters degree program can be recognized for that work with a 1.5 step increase if judged as exemplary performance. Such a flexible policy creates a way for faculty to advance in different ways—some through more common routes of meeting expectations in all three areas, and others by exceeding expectations in particular areas.

There remain unrealized possibilities in revising terms of advancement for faculty. For example, more campuses might consider a “tenure by objectives” approach, first suggested by Richard Chait (1998), wherein departments and faculty agree on career accomplishments required in research, teaching and service and allow faculty to check them off as they accomplish them over a longer period of time than the traditional tenure period of six or seven years. Also, more departments might create pathways from associate to full professor, or from lecturer to assistant professor, with an explicit emphasis on teaching and service, or on research.

A final example is from the University of Colorado School of Medicine. From 1986 to 1996 the University of Colorado School of Medicine had two separate tracks for medical faculty, but just one, the track emphasizing traditional research and teaching, was tenure-eligible. Faculty in clinical roles were not eligible for tenure, and the ranks of clinician-teachers were increasing. Citing Boyer’s *Scholarship Reconsidered*, in 1997 the University of Colorado School of Medicine changed its system to create a single, tenure-eligible track system wherein all faculty were expected to engage in scholarship, but scholarship broadly defined to include the scholarship of teaching and the scholarships of engagement and integration (Lowenstein & Harvan, 2005). The revised rules for tenure and promotion provided more than 60 examples of different kinds of scholarship in which academic physicians, scientists and teachers might engage to be promoted (Lowenstein & Harvan, 2005). This helped the institution and faculty better align standards for promotion with standards for job descriptions (e.g. primary

care, teaching, academic research) and it also legitimized the different kinds of scholarship as equally valuable to the School of Medicine, as one could be awarded tenure for engaging in any of the pathways offered.

At the time they wrote a case study describing the program, Lowenstein & Harvan (2005) noted that clinician-teachers had been favorably evaluated for promotion using Boyer’s broader definition of scholarship. However, issues remain, including how best to evaluate non-traditional outcomes from engagement and teaching scholarship (Lowenstein & Harvan, 2005).

3. Flexibility in faculty time to advancement

Old Assumption: All tenure track faculty should have six or seven years (depending on institution) to be promoted from assistant professor to associate professor with tenure.

New Considerations: The traditional six- or seven-year period on the tenure track may not be enough time for all faculty to meet the requirements of tenure. Faculty may need additional time to earn tenure based on work and personal circumstances.

Possibility: Create options that allow extra time for advancement and support use of these options.

As Williams and Dempsey (2014) articulated so well, we operate with many “ideal worker assumptions” within academe, which predispose us to assume that “star” scholars are those who move swiftly through their degrees and into tenure track faculty positions and on to tenure with no career interruptions. However, not every faculty member worthy of recognition moves swiftly through the ranks. Some take longer because of the complex and time-intensive nature of their work, because labs were slow to get started, and some because of family trajectories.

Several different studies of work-life policies have found that extension of the tenure probationary period, commonly called “stop-the-tenure clock” is the most common work-life policy available to academic parents (August, 2008; Bristol et al. 2008, p. 1313). Stop-the-tenure-clock policies were created to help academic parents balance the tenure track and parenthood. Such policies allow faculty who become parents to receive an extra year to achieve tenure. Studies of best practice note that it is important to remove the decision to add a year to the tenure clock from the department (Lester & Sallee, 2009). Once academic parents report that a child will be joining their family, the campus-wide human resources system should automatically grant an additional year. The best policies allow faculty to go back to their original tenure schedule, or give back the year if they later meet their requirements in the original time period. Stop-the-tenure-clock policies should be available to both women and men,

and ideally also are available for care of parents or other family members for personal illness (ACE, 2015; Lester & Sallee, 2009).

One issue of concern with stop-the-clock policies for family reasons is whether faculty will hurt their career advancement by taking advantage of them. Manchester, Leslie and Kramer (2010) studied this question and found a significant positive effect of stop-the-clock use for family reasons on the probability of promotion and receiving tenure when they studied the entire sample of faculty who used the policy. These findings suggest taking advantage of stop-the-tenure-clock does not significantly hinder faculty promotion outcomes (Manchester, Leslie and Kramer, 2010). However, research on the longer-term effects of stop-the-clock policies on salary, retention and advancement continues to emerge and needs to be reviewed carefully to ensure that faculty who take advantage of such policies are not later disadvantaged in some way.

Higher education institutions also could consider new possibilities in time-to-advancement policies. For example, more universities might remove the stigma associated with being a long-term associate professor by considering productivity during just the most recent five years served. And, instead of one-size-fits-all contracts for tenure or nontenure-track faculty, institutions might offer three-, four- or five-year initial contracts for faculty that might later be renewed for five, seven or 10 years, respectively, at the next promotion.

4. Flexibility in workload and rewards

Old Assumption: The structures and conditions of faculty work are fixed and cannot be changed. Faculty who cannot complete all aspects of their teaching, research and service roles at full capacity simultaneously are not meeting expectations.

New Considerations: The structures and conditions of faculty work are dynamic and might be changed to meet institutional and faculty needs. New demands on faculty (e.g. to diversify revenue sources, serve more diverse students, develop online programs) seem to require greater flexibility in how work is organized and rewarded.

Possibility: Create opportunities to customize faculty workloads in ways that advance both faculty and institutional goals.

For many years, scholars have observed that increasing demands by institutions and decreasing staff have resulted in an “overloaded plate” for full-time tenure track faculty (Gappa, Austin & Trice, 2007; Rice, Sorcinelli & Austin, 2000; Trower, 2012). Working 50-60 hour weeks or more, and not feeling as if they are performing adequately in any one area, can contribute to burnout and stress among faculty (Kreuter, 2013).

Similarly, institutions struggle to accomplish all parts of their missions well. In fact, Astin and Chang (1995) found it is a rare college or university that is able to create a work environment that is highly student centered, offers rich opportunities for student learning and engagement, and is highly research productive, with faculty publishing prolifically at the top of their fields. Fairweather conducted a study to investigate what percentage of faculty are “simultaneously productive in both teaching and research” (Fairweather, 2002, p. 30). The data for Fairweather’s study came from a nationally representative sample of 25,780 full-time and part-time faculty from 817 institutions of higher education used in the 1992-93 National Survey of Postsecondary Faculty. Fairweather found that just “22% of all faculty in 4-year institutions simultaneously attained high productivity in teaching and research” (Fairweather, 2002, p. 43). Fairweather defines high research productivity as authoring more refereed publications than the median for the field of study and institution, and/or serving as the “principal investigator on a funded research project” that was “above the median in both total research dollars and conference presentations” or in the top quartile of funding or number of conference presentations (Fairweather, 2002, p. 35). In many cases, the research vs. teaching dilemma can seem like a zero sum game for faculty. *U.S. News and World Report* and similar ranking systems, for example, evaluate and reward faculty for contributions to disciplines (O’Meara & Meekins, 2012), whereas student learning is enhanced by high-impact teaching practices.

Both disciplinary research and effective teaching take considerable time and effort, and there are few institutions that are able to accomplish both even moderately well (Astin & Chang, 1995). Institutions that are able to do so have found a way to merge such activities, so that more than one task is being accomplished at a time, or they allow different groups of faculty to make different contributions to these missions, or to contribute to all missions but at different times in one’s career. Given that many nontenure-track faculty are hired to teach, but have Ph.D.’s and want to continue to learn and contribute scholarship as well, the issue of finding ways to balance faculty roles and meet institutional needs affects both the tenure and nontenure-tracks (Kezar, 2012).

The College of New Jersey presents a good example of flexibility in the structure and conditions of faculty work. Faculty there reported that the majority of their workdays were spent teaching and completing campus service activities, and any research they conducted was primarily done on their own time (Flaherty, 2014). To reward faculty for the amount of time they spend teaching and mentoring undergraduate students while simultaneously increasing the amount of time available for research, the College of New Jersey overhauled its curriculum in 2003 to focus on undergraduate research and what Jeffrey M. Osborn, the

Dean of the School of Science, calls the “scholar-teacher” model (Flaherty, 2014). Flaherty (2014) explains how this new model, which was pilot tested during the 2004-05 academic year, reduced the number of courses faculty taught (from four to three) in order to increase the number of working hours (by six hours per week) available for faculty members to devote to research. In this new arrangement, faculty members also were asked to involve undergraduate students in their research to the greatest extent possible. To encourage greater collaboration with professors on research initiatives, undergraduate students would enroll in four courses per semester (instead of five), and each course was worth one more credit than it had been under the previous model (Flaherty, 2014). In addition to offering support for faculty research objectives, this new curriculum also was beneficial to students, according to Flaherty (2014), because the rigorous nature of the coursework helped prepare them for graduate studies.

At Stanford University School of Medicine, in response to concerns voiced by faculty that their careers required them to balance teaching, research, and campus service work with clinical care, the Academic Biomedical Career Customization (ABCC) program to enhance flexibility and faculty control over their workload was created. ABCC allows medical school faculty members to individualize their career trajectory and tempo (Valentine & Sandborg, 2013). By customizing their careers, medical faculty members can plan for themselves the type of work they want to take on and the time period in which they intend to complete it. Valentine and Sandborg (2013, p. 3) describe how faculty members work in teams with their department chairs and professional career-life coaches to develop each of the five dimensions of their three- to five-year plans. These five dimensions include “pace (anticipated time to promotion); workload (disaggregated into clinical, research, teaching, and administration); role as an individual contributor or leader; schedule predictability; and work-life integration”. The teams reconvene regularly to confirm that individualized plans are still amenable to the faculty members, make any alterations as necessary, and evaluate the individual’s accountability to it.

In addition, the ABCC program has a “time banking system” that allows professors to earn credits for completed work, which they can redeem for help with other tasks at work or home. Valentine and Sandborg (2013) explain that the banking system allows faculty members to take on responsibility when they can and rewards them with benefits to solve work-life and work-work conflicts when needed. For example, Rikleen (2013, p. 1) notes “the banking system allows hours spent on mentoring students and participating on committees to be converted into [other] support mechanisms.” These other support mechanisms include professional services such as grant writing assistance as well as support for work-life balance such as meal deliveries.

It is not a surprise that this banking system approach was developed in a medical school, where there are more resources than in most public institutions, and where there is significant attention to supporting women in the field. The time-banking system is especially beneficial to women because, as Dr. Jennifer Raymond, Associate Professor of Neurobiology and Associate Dean for Faculty Career Flexibility at Stanford University Medical School, notes, “Women in academic medicine... experience more work-work conflict than men,” and women faculty often are responsible for more teaching and service work than their male counterparts, which could be detrimental to their potential for promotion given that promotion often is based on research and publications (Trimble, 2013, p. 1). The flexibility offered by the time banking system and career customization model assists faculty members in managing their time and workload. The ABCC program was awarded the Alfred P. Sloan Award for Excellence in Faculty Career Flexibility in 2012. Rikleen (2013) reported initial evaluations of the program were positive and the intent is to scale it up beyond its first 50 participants to the rest of the medical school.

Although few campuses will have the resources or leeway to create a banking system that provides credits for both professional services and work-life supports (e.g. credits for child-care, meals, and gym membership), the concept of a banking system might be used in less-resourced institutions within the realm of existing resources. For example, imagine the standard teaching load for a course is 30 students and that most professors teach three classes, serving 90 students total. If a professor can make a good case that they can serve students just as well in two classes of 45 students each, their department chair might provide them a course release to work on research for what would have been their third class.

Flexibility may increase naturally among tenure-track faculty as they achieve tenure and promotion to full professor and choose to spend more time on some activities and less on others. However, there are missed opportunities for department chairs and faculty to come to agreement on customized workloads that meet faculty and institutional needs both before and after tenure has been awarded. In some ways, customized faculty workloads are similar to the trend already occurring of hiring faculty into specialized nontenure-track positions (e.g. lecturer focused on teaching, research scientist focused on research, extension agent focused on professional service and outreach). However, these situations differ in that there is an assumption that the customized tenure or tenure-track faculty work domains could change after an agreed-upon period of time. Increasingly, institutions are finding ways to allow faculty in specialized nontenure-track faculty positions to move up in rank (e.g. from assistant to associate research scientist), but their job description primarily remains the same or

increases responsibility within the same work domain. Instead, the idea presented here is that a department chair and faculty member would agree that for a set period the faculty member's efforts will be focused on a particular work domain, but that could change later to a different distribution of effort across teaching, research and service at some agreed-upon time.

Necessary Ingredients for Making Flexibility Work: Consensus, Transparency, Accountability and Trust

What is needed to implement new work agreements such as those described above? First, institutions and individual faculty need to revise the mindset that there is just one career track and one way of working that is ideal, legitimate and satisfying. There is no one-size-fits-all model, and institutions and faculty will likely reap benefits when careers are more flexible. The diversity of faculty interests and talents can align with institutional missions and goals if targeted appropriately. Second, individual faculty and institutions need to enter into a trust relationship free of a zero-sum-game assumption. They need to be willing to compromise in ways that allow both individuals and institutions to win, and to trust that both will satisfy their end of the agreement. For example, if faculty members enter into an alternative career track, but those standards are not used by department committees for tenure or promotion decisions, the agreement will not work. Likewise, if a faculty member agrees to work part-time for their institution, but then collects the equivalent of full-time pay from outside consulting sources when they agreed not to, the program will not work.

It is also important to implement these flexible work arrangements in ways that reduce resistance and backlash. These arrangements present change, and not all faculty and administrators will respond positively to or see a need for change. The literature on backlash suggests that it is rooted in fear and threat. In particular, social science research points to the fact that backlash is exacerbated when people within a system feel threatened and believe that their status will be violated (Rudman et al, 2012). People experiencing system threat tend to defend the system and their own worldviews (Kay et al, 2009).

Several conditions can minimize the prevalence of backlash and its effect on outcomes. It is important for institutional leaders to explain clearly what is not working about the status quo and describe the risk and negative consequences of doing nothing. Organizational leaders, union leaders, or faculty in departments should then have open discussions of possible solutions and share concrete examples from other campuses (Steele, Steyer & Nowalk, 2001). As new policies are being rolled out, administrators and faculty should work to keep open lines of communication (Harrison et al, 2006; Rudman & Phelan, 2008), as the first test cases of faculty using the policies will be highly visible. It is critically important for those shepherding the policies to track how

well they are working, amend them as necessary, and study the outcomes (intended or unintended) over time.

Open discussion about the negative consequences of the lack of workplace flexibility (losing talent, low morale, high stress) will foster greater buy-in to the need for more flexible arrangements (Harrison et al, 2011; Steele, Steyer & Nowalk, 2001). Further, a study conducted by the Sloan Center on Aging and Work at Boston College (2015) found that over half of employers surveyed perceived concerns about treating employees equally as a barrier to implementation of their programs. As such it is important for leaders to make sure that they are not only monitoring those who take advantage of these flexible policies, but also those who do not, to make sure their workload does not increase as a result.

Finally, there will be those who resist adding flexibility programs to faculty careers and work-lives based on cost. It is true there will be costs associated with some of these changes. For example, instructors need to be replaced when faculty take advantage of parental leave, and that provides a cost to the institution. However, this cost must be weighed against the competitive advantage institutions acquire when they provide parental leave benefits to their employees and recruit talented faculty based on these benefits.

Social science research on employee well-being, satisfaction, stress, and productivity all suggest that improving workplace systems to be more flexible will reap many benefits in organizational effectiveness as well as individual faculty satisfaction. There are three areas where the reforms discussed in this paper are likely to have the greatest impact: reduced faculty role conflict and stress, increased sense of inclusion, and enhanced sense of procedural and distributive justice. Each of these individual factors has an impact on organizational outcomes of job performance and retention.

For example, research has shown that certain kinds of stress, such as stress caused by role conflict, has a negative relationship with job performance (Cavanaugh, Boswell, Roehling & Boudreau, 2000). Daly & Dee (2006) found that role conflict predicts faculty intent to stay at a university, as faculty with less role conflict are also more satisfied and committed to their institutions. Allowing faculty to develop more individualized workload assignments to emphasize one area more than others for a set period of time will help mitigate role conflict. A second potential benefit of flexibility programs in higher education relates to employee sense of inclusion. Inclusion refers to "employee perceptions that their unique contribution to the organization is appreciated and their full participation is encouraged" (Mor Barak, 2015, p. 85). Reforms described in this paper that allow individualized workload assignments, varied pathways to tenure, and more time to achieve tenure signal to employees that their institution values both the unique nature of their work and them as a person. As such, faculty are likely to feel more included in their workplace.

Further, faculty sense of procedural and distributive justice with workload and rewards are highly correlated with employee well-being (Mor Barak, Findler & Wind, 2003; Maranto & Griffin, 2011) and faculty department and organizational commitment (Lawrence, Celis & Ott, 2014). Research has consistently found that women and under-represented minority faculty engage in more time on teaching and service than their male and white peers (Eagan & Garvey, 2015; Hurtado et al, 2012) and experience greater stress and dissatisfaction because they are not rewarded for it (Misra et al, 2011). Many of the flexibility reforms noted here aim to make teaching and service work more visible and accounted for, and to better align workloads and rewards. As such, increasing flexibility in workplace systems can enhance faculty sense of procedural and distributive justice, which is critical to faculty satisfaction, organizational commitment, and retention (Daly & Dee, 2006).

The costs of developing flexibility programs needs to be considered in light of the costs of *not* implementing such programs and the added benefits of doing so. In addition, many of the flexibility programs do not cost institutions more money. For example, it usually does not cost institutions to provide faculty an extra year to go up for tenure, add students to their classes in exchange for a course release, or create a banking system where faculty can credit one kind of work for another. It does however, require administrators and faculty working together to create consensus on reforms, transparency and trust in implementing reforms, and accountability in tracking outcomes.

Conclusion

Workplace flexibility can be a strategic advantage for higher education, with tremendous untapped potential to be deployed if we are willing to rethink old assumptions about the terms and nature of faculty work and appointments. Many of the structures that govern higher education faculty work-life today were created at a time when the public subsidies of higher education were far higher, and when higher education was male dominated. Indeed, many of the most familiar features of higher education and faculty careers (tenure, the three-credit class, majors) were designed between 1865 and 1925, with some gaining momentum in 1940. Faculty more often were white men, and had stay-at-home wives or weren't married. Public higher education costs for students were minimal; state funding and scholarships could cover most costs for students, and a summer job could make up the difference. Today, however, we need to revise organizational practices to encompass new realities.

Rather than allowing departments, colleges and universities to continue to perpetuate the status quo by assuming a lack of alternatives to current practices governing faculty appointment, advancement, workload and rewards, the institutions profiled in this paper have worked with their faculty to create new flexible workplace agreements. These agreements require the faculty and the institution to compromise on some benefit, norm or expectation in order to succeed. These reforms assume more than a zero sum game: both institutions and individuals can win, as long as they enter into agreements with trust and a willingness to question and examine old assumptions. And when institutions and the faculty are winners, both students and our broader society are the ultimate beneficiaries.

About the Author

KerryAnn O'Meara is Professor of Higher Education, Director of the ADVANCE Program for Inclusive Excellence, and Affiliate Faculty in Women's Studies at the University of Maryland, College Park. O'Meara's research examines organizational practices that support or limit the full participation of diverse faculty and the legitimacy of diverse scholarship in the academy. Her recent work examines how work environments influence faculty agency and departure, the role of peer networks in advancing equity and inclusion, and gender equity in workload and distribution of campus service. Her work has been published in the *Journal of Higher Education*, *Review of Higher Education*, *Research in Higher Education*, and *Gender and Education*, among other venues. She consults with higher education institutions interested in adapting their promotion and tenure policies to acknowledge broader definitions of scholarship and to reform their workload, retention, and faculty development systems to support women and under-represented minority faculty.

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