

**Workload Considerations in Academic Program Review:
An Opportunity to Advance Equity
(O’Meara, Beise, Culpepper, Jaeger, & Misra, 2021)**

As researchers leading the NSF-ADVANCE Faculty Workload and Rewards Project (2015-2021), we worked with academic departments on issues of equity in faculty workloads. In this brief, we summarize how insights from this project might be applied to the process of academic program reviews. We believe **academic program reviews may provide a distinct opportunity for reflection on and accountability for equitable workloads.**

Across multiple studies, our research and prior work has found that faculty members who experience equitable workloads in their departments are more likely to be retained and productive. Among the many conditions found to be associated with workload equity are: transparency, clarity, credit, norms, context, and accountability (Misra et al., 2021; O’Meara et al., 2020, 2021a, 2021b).

Transparency increases sense of accountability, trust between members and leaders, facilitates perceptions of procedural & distributive justice, and leads to greater organizational commitment (Bilimoria et al., 2008; Daly & Dee, 2006; Neyland, 2007; Norman et al., 2010). Both the Athena SWAN project (Athena Forum, 2018) and our own research (Misra et al. 2021, O’Meara et al., 2018, 2019) found **departments that routinely make faculty work activity data accessible promote perceptions that workloads are equitable.**

Likewise, we found that faculty members in academic departments with established routine policies and practices to act as guardrails (such as expectations policies, credit systems, and rotations of time intensive roles) felt their workloads were fairer compared to faculty members in departments without such policies and practices (Misra et al, 2021; O’Meara et al., 2018, 2019).

About This Brief

Many campuses have a required periodic review process for academic units. Often this process is mandated by state or regional accreditation requirements. The scope of such reviews typically include not only graduate and undergraduate instruction, but also research, service, staffing, and available facilities. This brief summarizes where and how issues of faculty workload might be considered in academic program review.

There are at least three places where issues of workload, and workload equity, might be considered in academic program review: **Program Self-Study; External Reviews; and Final Recommendations.**



AREA 1: PROGRAM SELF-STUDY

Audit of Workload: As departments prepare self-study reports, we recommend they consider collecting the following kinds of information, displayed simply in tables or summaries by rank and appointment type (including graduate student appointments), and where possible by race and gender.

- Teaching: number of courses, course size, required/elective, undergrad/grad, lab or other consequential differences
- Mentoring: number of committees chaired and/or served on for undergrad/MA/PhD students, postdocs, other advising, etc.
- Service: number of committees, chairing committees, other leadership activities (and accounting that recognizes differential effort present in different kinds of service)

Audit of Faculty Perceptions of Workload Equity: Institutions might include faculty work environment survey data (e.g., COACHE, or institutional survey) providing a sense of faculty satisfaction with their workload, the process of teaching and service assignments, and the relationship between workload and reward system. Such data could also be collected and summarized qualitatively through a focus group.

Audit of Policies and Practices: Summarize any policies supporting workload equity or thwarting it. Examples include policies that outline workload expectations, rotations of time intensive service roles, differentiated workload policies, annual review policies, teaching and service assignment policies, or policies outlining compensation for particular administrative roles. If there is a particular context or policy constraining equity (e.g., system workload guidelines), outline it.

Priorities and Challenges: Summarize data collected among faculty about the departmental work activities that are valued or no longer valued and the work activities that align with departmental goals or aspirations. This summary should also include workload expectations, including both the quantity and the quality of work that faculty members by rank and appointment type are expected to do. The department should explicitly discuss how diversity, equity, and inclusion work can be shared across the department, rather than shouldered by a few department members.

AREA 2: EXTERNAL REVIEW

As external reviewers are enlisted to review reports and visit with the department, they might consider asking the following questions:

- Are there differences by rank/appointment type, gender and/or race in the amount of teaching, advising, and service faculty member do? How is diversity, equity, and inclusion work distributed across department members and/or recognized in workload or rewards systems?
- Do faculty members have access to transparent data on faculty work activity in areas of service assignments, advising, and teaching loads in relevant categories (i.e., rank and appointment type)?
- Are there clear policies outlining what is expected of faculty members in terms of expectations for teaching, advising, and service? What happens when faculty members do not meet expectations?
- Is there a way to provide faculty members credit for doing more than is expected, such that they do less of some other kind of work or are otherwise rewarded and/or compensated? Is there a way in the workload system to account for unique contexts (e.g., being undergraduate program director, being called upon often as BIPOC faculty member to serve on faculty searches)?
- Is the process of assigning teaching and service transparent and fair? How do these policies work across rank and appointment type?
- Is there a way to acknowledge ongoing differences in workload due to career stage, interests, or responsibilities (e.g., through a differentiated workload policy)?

AREA 3: FINAL RECOMMENDATIONS

As academic leaders meet with departments to review self-studies, external reviews, and make final recommendations, we think there is an opportunity to encourage departments to:

- Create a routine way to share workload data, even if in simple tables updated annually, with department faculty members so they can benchmark their effort against other department members.
- Clarify faculty expectations with relevant considerations for appointment type and rank.
- Create some basic equivalencies for faculty work activities in certain areas that are relevant across academic units (using narrative, credit, or point systems) that credit differential effort.
- Consider options for differentiated workloads negotiated in academic units with chairs.

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Learn more about the Faculty Workload and Rewards Project:

<https://facultyworkloadandrewardsproject.umd.edu/>