W. P. Carey Forward Task Force

Progress Report

December 1, 2017

W. P. Carey Forward Website
https://employees.wpcarey.asu.edu/forward/overview
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Overview

Purpose of This Document

The purpose of this document is to provide a general update to the faculty and staff of the college of the status of the task force’s efforts with respect to the charges given the task force by Dean Hillman as part of the W. P. Carey Forward initiative. This initiative currently calls for non-tenure track (NTT) faculty and an associated contingent of staff to be placed into a new teaching unit with its own distinct leadership, governance and management structure, evolved set of development activities and practices, and physical location (ostensibly on the fourth floor of the BA building).

In this section we will provide a general review of the high level structure of the tasks at hand and how the task force has been organized to address them. The subsequent sections will contain the specific updates of the committees with respect to their charges.

Please note that all of the information given is meant purely to reflect the current thinking of the task force. This is not a proposal. None of what is given is intended to be fixed or final. The task force’s work is still in motion and evolving.

Task Force

Figure 1 depicts the official task force roster. Two faculty members were chosen by each department to represent them. In addition, Angelina Saric was asked to join to represent staff considerations, Elaine Armfield was asked to join to provide project assistance, and Michael Goul was asked to act as the facilitator.

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melissa Samuelson</td>
<td>Accountancy</td>
<td><a href="mailto:Melissa.Samuelson@asu.edu">Melissa.Samuelson@asu.edu</a></td>
</tr>
<tr>
<td>David Shields</td>
<td>Accountancy</td>
<td><a href="mailto:David.Shields.1@asu.edu">David.Shields.1@asu.edu</a></td>
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<tr>
<td>Kelvin Wong</td>
<td>Economics</td>
<td><a href="mailto:Kelvinwong@asu.edu">Kelvinwong@asu.edu</a></td>
</tr>
<tr>
<td>Alexia Shonteff</td>
<td>Economics</td>
<td><a href="mailto:Alexia.Shonteff@asu.edu">Alexia.Shonteff@asu.edu</a></td>
</tr>
<tr>
<td>Renee Hughner</td>
<td>Agribusiness</td>
<td><a href="mailto:Renee.shaw@asu.edu">Renee.shaw@asu.edu</a></td>
</tr>
<tr>
<td>Wendell Licon</td>
<td>Finance</td>
<td><a href="mailto:wendell.licon@asu.edu">wendell.licon@asu.edu</a></td>
</tr>
<tr>
<td>Mike Frutiger</td>
<td>Information Systems</td>
<td><a href="mailto:Mike.Frutiger@asu.edu">Mike.Frutiger@asu.edu</a></td>
</tr>
<tr>
<td>Robert (Bob) Wood</td>
<td>Information Systems</td>
<td><a href="mailto:Robert.E.Wood@asu.edu">Robert.E.Wood@asu.edu</a></td>
</tr>
<tr>
<td>Mindy West</td>
<td>Management</td>
<td><a href="mailto:Mindy.West@asu.edu">Mindy.West@asu.edu</a></td>
</tr>
<tr>
<td>Mathias Arrfelt</td>
<td>Management</td>
<td><a href="mailto:Mathias.Arrfelt@asu.edu">Mathias.Arrfelt@asu.edu</a></td>
</tr>
</tbody>
</table>
In addition to the existing task force membership, the guests shown in Figure 2 have been providing voluntary support for the efforts of the task force.

![Table: Task Force Volunteers](image)

Given the scope of activities and the importance of this work to the college, the task force set an aggressive meeting schedule throughout the fall, meeting for 90+ minutes weekly in addition to 60-90 minute weekly meetings by individual committees, off-site visits, and meetings with 3rd parties.

### Charges & Committees

Upon forming the task force, dean Hillman provided the following seven charges. To address these, four working committees were formed around topical subsets of the tasks as follows:

**Space Planning**
- Make recommendations on space planning¹

**Management**
- Area leader and associated national/internal search²

**Governance**
- Make recommendations on the matrix structure to retain strong discipline identification and rich connections with research units
- Work with department chairs to establish roles for discipline-specific teaching leads who will be the chief liaisons with the research units

**Development**

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¹ Originally “Consult on and design the new workspace”; new language introduced 9/27/2017
² Additional charge introduced 9/27/2017
• Decide if “Professionals in Practice” should be the ongoing moniker; recommend alternates if not
• Set priorities for teaching development workshops
• Begin working on a mentoring program for all new teachers (and related onboarding activities)

Committee Membership

Figure 3 shows the existing committee membership. Names shown in bold represent the chairs of each committee.

<table>
<thead>
<tr>
<th>Space Planning</th>
<th>Management</th>
<th>Governance</th>
<th>Development</th>
</tr>
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<tr>
<td></td>
<td><strong>John Eaton</strong></td>
<td>Mathias Arrfelt</td>
<td>Kathryn Eaton</td>
</tr>
<tr>
<td>Michael Frutiger</td>
<td>Wendell Licon</td>
<td><strong>Reynold Byers</strong></td>
<td>David Shields</td>
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<td>Alexia Shonteff</td>
<td>Mindy West</td>
<td>Detra Montoya</td>
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<td>Sarah Canales</td>
<td>Robert Wood</td>
<td>Melissa Samuelson</td>
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<tr>
<td>Nancy Gray</td>
<td></td>
<td>Angelina Saric</td>
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</tr>
</tbody>
</table>

Figure 3. Committee Membership

Scope

In estimating the size of the population based upon the departments included in the initiative we compiled Figure 4. All categories of NTT within these selected departments would be included, in addition to all faculty associates and an estimated 6-10 staff members. Note that this scope of those included does not consider the potential additional staff who may be recruited to support the W. P. Carey Forward initiative’s Solutions Center (aka Solutions Lab). The Solutions Center is not currently within the scope of the task force’s activities.

<table>
<thead>
<tr>
<th></th>
<th>Totals</th>
<th>Accountancy</th>
<th>Finance</th>
<th>IS</th>
<th>Management</th>
<th>Marketing</th>
<th>Supply Chain</th>
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<td>27</td>
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<tr>
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<td>17</td>
<td>20</td>
<td>13</td>
<td>10</td>
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<td>Clinical</td>
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<td>11</td>
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<td>5</td>
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<td>Prof of Practice</td>
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<tr>
<td>Faculty Assoc</td>
<td>45</td>
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<td>9</td>
<td>10</td>
<td>4</td>
<td>10</td>
<td>3</td>
</tr>
</tbody>
</table>

Figure 4. Faculty Employed by Included Departments as of Fall 2017

3 Economics and Agribusiness are not currently included in the scope of the initiative.
It is worth noting that the included NTT faculty groups are expected to continue to grow significantly over the course of the next few years.

Timeframe

While task force activities were originally structured around a January 15th proposal deadline with a Fall 2018 “go live” goal, on 11/13/2017 Dean Hillman announced that the initiative timeframe would be extended significantly to allow for the best solution to emerge, with a new full launch of the initiative occurring around the start of the 2019 fall semester.

To take advantage of this extended timeframe while acknowledging the time needed by leadership to coordinate the scope of the requisite activities anticipated, the task force’s proposal deadline has been extended to March 2, 2018. The timeline below represents our current understanding based on feedback from the dean’s office and our working assumptions. The role of the task force following the submission of its final proposal is as yet unspecified.

Spring 2018
- Final task force proposal due 3/2/2018
- Selected subset of development activities chosen & prepped for fall 2018 launch

Fall 2018
- Pilot development activities begin
- Optional: Begin recruiting teaching unit lead

Summer or December 2018
- Supply Chain offices relocated

Spring 2019
- Demolition & construction on new spaces begins
- Hire teaching unit lead
- Appointment of NTT discipline leads

Fall 2019
- Official launch, including
  - Redesigned & repurposed space
  - New development practices
  - New management and governance structure
Space Planning Committee

Scope of Activity
The space planning committee focuses on the charge of making recommendations on the use of space in the W. P. Carey Forward initiative. The focus of the recommendations has been on the creation of an innovative workspace for NTT faculty and associated staff to be housed on the 4th floor of the BA building and reimagining space within the business school for meaningful faculty-student interactions.

In the creation of its recommendations, the committee has refined this charge to address the following goals:
- Address the need to accommodate a growing body of NTT faculty, administrative staff, and students.
- Create a space that will accommodate the multitude of needs required by the NTT faculty including:
  - Quiet workspaces for class planning, research, writing, and projects
  - Space for meetings and office hours that foster connections and engagement with colleagues and students
  - Convenient and efficient co-location of staff, tutors, teaching assistants and other resources that support teaching excellence.

The following locations are currently under consideration for use in meeting these goals:
- 4th floor of the BA building (with substantial renovation planned)
- Locations near current classroom (e.g. similar to the breakout rooms outside of McCord classrooms)
- Minor spaces within existing departments
- The possibility of common space(s) outside of 4th floor for student interaction

Work Done
The work of the space planning committee is ongoing. To date, this work has been largely focused on understanding the:
- Space-related needs and concerns of faculty included in the initiative
- Boundaries of the potential solution
- Practices surrounding contemporary space planning, especially with regards to open layouts

In order to determine the scope of concerns and needs, the committee members engaged with faculty of all levels within their respective departments to better understand their concerns and
to build working sets of potential space requirements. The broad scope of the concerns captured has greatly refined our sense of requirements, but it also highlighted the challenge inherent in accommodating the diverse activities and work styles of the included faculty. To further refine our understanding, we worked with representatives from marketing to conduct a process mapping/ blueprinting session designed to build a comprehensive understanding of our workplace needs based upon two identified key archetypes: those who conduct most of their work in their office existing office, and those who engage with a very large quantity of students regularly.

To evolve our understanding of the practical boundaries of the solution, we continue to work with the dean’s office to discuss and explore a number of possibilities. Members of the committee also conducted site visits at open-office and coworking spaces including Co+Hoots, SkySong, and ASU’s newly renovated English Department space, as well as researching and virtually touring several other innovative work spaces.

In the course of our work we have generated documentation on site visits, blue printing/ needs assessment, working assumptions and planning details, and more. While these works fall outside of the scope of this document, they are available upon request for consideration by members of the college.

Challenges Identified & Lessons Learned

Overarching Challenges

Over the last two months we have learned a number of lessons that have provided necessary color to the existing challenges. These challenges can be broadly placed into two categories:

1. Open Space Design
   a. Two types of Open Concept: When people talk about open space design or open concept, they are often conflating two conflicting ideas: On one side are the ultra-space-efficient layouts of a 1960s newsroom with desks end to end and no barriers, and on the other side are the luxuriously space-celebrating designs that are highlighted in the popular press as the state of the art in contemporary business. Those designs which truly celebrate open spaces are not inherently space-efficient. Those which are space efficient are not inherently attractive or celebrated.
   b. All forms of open space design require careful planning and orchestration to overcome the unique complications inherent in it. These typically include:
      i. The use of a network of ambient noise generators to overcome cavernous acoustics.
ii. The widespread use of headphones (typically 60-75% in use seen in site visits), preferably those with noise cancelling and/or sound isolating characteristics.

iii. Conditioning workers to observe best practices necessitated by the space, e.g. Keeping conversations in restrained tones (this can be encouraged by certain design choices)

iv. Creating natural limiters for private spaces, e.g. less comfortable chairs or limited work areas to deter use

c. Special care also needs to be taken to foster affiliation and attachment to shared spaces. The English Dept provides a cautionary tale of shared open space (one NTT faculty member there referred to being “erased” each day).

d. Special safety issues should be addressed. Standard practices around emergency incidents such as active shooter protocol must be handled very differently when there are limited barriers or opportunities for containment. To the extent space is shared or constrained, increased levels of illness may be anticipated.

2. Workspace Requirements

a. Need for two distinct spaces: While open concept workspaces in industry frequently feature limited customer interaction, the nature of our customer base (students) would seem to preclude this for privacy (e.g. FERPA) and security reasons. While the use of offices affords controlled access multi-purpose space, the use of open space necessitates the creation of separate areas for student engagement and individual work.

b. The need to support high levels of student engagement while removing students from faculty workspaces, nothing that:
   
i. Technology-based interactions, where feasible, currently provide a comparatively lean substitute.

   ii. An increased use of casual spaces (e.g. coffee shops) for student interactions may be contrary to the need for professional interaction.

c. The inherently solitary creative activity of many scholarly activities.

d. The work activities of the NTT faculty are highly diverse, with the distribution of individual tasks across teaching, research, and service varying significantly not only by individual but by time period for a given individual.

Specific Challenges

We believe significant space beyond the 4th floor of the BA building is necessary to provide for the multiple space needs of the existing NTT faculty and to make good on our mission of providing teaching excellence. The NTT faculty currently represent approximately half of all faculty, with a growth rate that is currently anticipated to exceed that of T&TT faculty. Further, a review of the workspace needs of the NTT faculty has highlighted the diverse needs and the irregular workspace demands that fluctuate within and across semesters (consider peak periods
vs. typical). An innovative new space for faculty, staff and students should be fluid, flexible, and allow for future growth.

We believe it is valuable and consistent with the Dean’s vision to create a consistent destination for student engagement. Maintaining some student office hours within traditional departments while removing others to a separate location has a large potential to create confusion for students. Students appreciate the distinction between departments but not between “research” faculty and “teaching” faculty, and this is not a distinction we wish to foster. As an example, a student may recognize a need to meet with their finance professor, but disparate office hour locations (for different faculty classifications within a department who teach the same course) across floors or buildings will create confusion.

We believe we must create/support opportunities for incidental interaction with students. Students are currently able to drop-in on faculty in their offices and anecdotally report this type of accessibility as being a valuable part of their experience. These “drop-ins” are a potentially significant aspect of student-faculty interaction that is as yet unmeasured as is has not been captured by previous measures such as efforts to quantify office hours and is at risk without intervention.

We believe faculty must be provided with a safe quiet work environment to develop lectures, prepare materials and examinations, record videos, engage in research and writing, and develop projects beyond their teaching duties on behalf of the school. In addition to the likely inherent incompatibility of student presence and quiet faculty workspaces, the issues of privacy and security described above further highlight the need for student interactions to take place in a different location separate from the NTT faculty work environment.

We believe there are significant opportunities to better utilize the overall space held by the college if we are able to take a step back and consider space allocation as a whole. Ideally, this would involve defining strategic goals for the college, determining how space use best aligns with those goals, and then using this planning to determine a type of “zoning” akin to that used for city planning.

**Moving Forward**

Given the critical importance of space and the concerns surrounding it, we recommend engagement and collaboration with the ASU Design School managed by the W. P. Carey Dean’s office and/or W. P. Carey Forward Task Force. Such as collaboration would provide an innovative and interdisciplinary effort to develop cutting-edge space recommendations for the teaching unit and its affiliated functions. By leveraging the design expertise of the ASU Design School, we will be ensured that the space need considerations are done with attention to current research and innovation in open-space design. Further, it provides the Design School opportunities to enhance their profile in applied research, even as W. P. Carey gains expert recommendations with little-to-no-cost. The primary input for the collaboration would be
managed by the Task Force in providing Design School faculty and graduate students guidance and details about project. All outputs and recommendations received from the Design School would be handed to W. P. Carey Dean’s office for their consideration in the final plan. Given the potential for an innovative and collaborative effort across colleges within the University to be high-level or high-profile in nature, our intent would be for the collaboration to be structured and approved with the coordination of the W. P. Carey Dean’s office, rather than seeking Design School guidance on our own. While the background work of the task force, mentioned above, gives context to our space needs, we feel that the best recommendations for the solutions and application would come from those who study and have expertise in space design. Further, faculty working together across colleges enables a deeper sense of community across the ASU University as well as ensuring that an understanding of needs specific to faculty will be taken into consideration in the design process.

The timeline for the collaboration can be structured so as to provide significant recommendations and feedback for the development of space, while acknowledging that full implementation of the collaborative outcome will not be immediate. We recommend establishing the partnership at the start of the year, January 2018, and sharing materials with the Design School faculty as soon as possible. Based on collaborative efforts, preliminary data and guidance for the task force and W. P. Carey leadership will meet the March 2, 2018 deadline. Based on those initial ideas and recommendations, the Dean’s office can begin the space development process, even as the Design School finalizes a detailed proposal for the space, which will be available for consideration at the end of the Spring 2018 semester.

In addition to and potentially as a complement to the collaboration proposed above, we intend to continue to assess the needs and requirements of the faculty and associated staff of the new unit. As part of that ongoing effort, we plan to look further into ways to better measure the current utilization of space. Given the challenges described earlier with respect to varying schedules and styles, capturing the extent to which space is used is daunting, however, the risk in not doing so is notable. A key example of this is the potential implications of insufficiently characterizing peak load.
Governance Committee

Identity of Non-Tenure Track Faculty Group: Being a matrix structure, NTT faculty belong both to a department and to the (yet-to-be-named) Teaching Group. Overlap occurs in the realms of subject matter expertise and curriculum, research (where applicable), service opportunities and participation in departmental interests. The teaching group leader manages, evaluates, and advocates for the non-tenure track faculty in the teaching group. The teaching group leader represents the teaching group at the highest levels of organization in the school, including being a full voting member of the admin council.

Matrix Structure

Organizational Structure:
A proposed organizational structure for the NTT Faculty group would consist of a group leader, a “functional liaison” assigned to work with each department, and staff support for the group leader and each of the liaisons (see diagram below).

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4 The teaching group described here is also referred to as the teaching unit elsewhere.
5 The functional liaison described here is equivalent to the discipline lead described elsewhere.
**Scheduling**: This task ties into almost all governance issues and drives several of them so we start here. The question is: “With the existence of the new group, how should scheduling work?” Our current thinking is that the scheduling process would be seen as a **collaborative process** between departments and the teaching group liaisons and group leader. Details include (see diagram below):

- Department chairs and schedulers identify their needs and preferences for assigning faculty to courses and then pass that information to the Teaching group.
- **Teaching group leadership** completes the allocation of faculty to courses in the schedule.
- **Functional liaisons** communicate/negotiate with the department schedulers to coordinate, work out, address any potential conflicts.
- Departments and teaching group share **equal say** in determining finalized teaching assignments.
- **Unresolvable conflicts** (“ties” so to speak - elevated to Teaching Group Leader and Department Chair first) are broken/resolved by program leadership (faculty directors of programs, GPO, UPO).

This structure places the Teaching Group Leader at the same “level” as a Department Chair for scheduling purposes. The **Functional Liaisons are equivalent to “assistant department**
chairs” for the teaching group and are responsible for managing/navigating relationships with the departments and their schedulers. We anticipate that conflicts could be kept to a minimum by good relationships between functional liaisons and the departments and most issues can be handled by negotiation and influence at those levels.

**Hiring:** Hiring of NTT faculty is a collaborative process between teaching group and departments. Both groups evaluate potential hires and make a recommendation to the Dean's Office. Either group can generate a request for a job posting which is reviewed and approved by the Dean’s Office.

**Retention/Firing:** Retention (or non-retention) is handled in the same way as hiring in that both groups provide feedback and an opinion on the question of retention/non-retention and make a recommendation to the Dean’s Office.

**Teaching Evaluation:** Teaching group performs teaching evaluation of NTT faculty and of those Tenure Track faculty as requested by the department. After evaluations are completed the group makes recommendations to chairs and personnel committees. All new NTT faculty are assigned to a formal mentoring relationship. Departments can recommend Tenure Track faculty for formal mentoring relationship.

**Research Evaluation for Non-Tenure Track Faculty:** Departments review research of NTT faculty based on department journal lists and make recommendations to the teaching group. Teaching group reviews NTT faculty research based on their journal list and makes final judgment of research contribution for NTT faculty.

**Service Assignment and Evaluation:**
Service assignments are determined jointly between teaching group and departments. Annual evaluation of service contribution is evaluated both by the department for department-level service and by the teaching group for all other service. The teaching group makes the final determination of “satisfactory” service for NTT faculty. We highly recommend that a quantitative scale of service contribution be developed for use in evaluation of service contribution. This necessarily requires the development of a comprehensive tracking system for service.

- University: Senate, grad council, etc.(?)
- College: Undergrad committee, master’s program committee, master’s standards committee, faculty council,
- Department: Department committees, interface with advisory boards, etc...
- Discipline/Industry/Community:
- Teaching Group: Mentoring, Buddy program, Honors theses...
- Compensated: Functional liaison, assistant department chair, program director, Assistant/Associate Dean
Curriculum: Curriculum is owned by the departments. Our presumption is that all departments manage curriculum via department-level Undergraduate and Master’s committees and that each committee has representatives from the teaching group on each committee.

Budget: Funds needed for (a partial list): Workshops, staff, student worker/GA support, technology, office supplies, travel, furniture, phones, catering for meetings and get-togethers, summer teaching development grants, summer research grants, research.

Possible proposal for how a budget would work in a NTT faculty group:

Non-discretionary/operational:
- Salaries (faculty/staff)
- Technology
- Furniture
- Office Supplies

Dean’s Office

NTT Faculty Group

Departments

Tax rate from departments for “teaching development:”
- Workshops
- Teaching Conference
- Teaching development
- Teaching-focused research
- TA/GA/Student workers

Budgetary wish list:
- Discretionary budget amount for each FT faculty (~$2,000) - Conference travel, teaching materials, additional technology,
- Summer development (research or teaching), new course materials development.
- Overload pay per section of a course: (standardize across school to 12.5% of salary with a cap of $17,500) [What's the justification for making overload pay different between grad and undergrad?]
- Teaching Load Standardization
Staff Roles:
One staff support for each functional liaison (total of 6)
One staff support for the group Leader specifically (plus acts as manager of staff)
Front office/operational (could be student workers)

Moving Forward
The Governance committee still has several issues that require consideration and greater detail. First, we will need to work on fleshing out the needs and details of a budget for the group. Second, the question of the “solutions center,” what it is, how it operates and how it interfaces with the NTT Faculty group. Finally, we will need to consider the roles of standing committees, their functions and responsibilities within the NTT faculty group.
Management Committee

Scope of Activity

Early on it became apparent that the management committee’s specific recommendations for the position of unit lead and discipline lead were contingent upon the decisions made by the governance committee. With that in mind, the management committee has moved to simultaneously 1) collaborate with the governance committee on the implications of governance choices for these two roles and 2) explore general practices and principles around the types of positions envisioned. This has included interviewing Michele Pfund to capture potential similarities between her role and that of the unit lead, a deeper understanding of the points of interface between the teaching unit and undergraduate programs, and her input on the requirements of a position at the envisioned level (both how to recruit and who to recruit).

Current Thinking

The discipline lead is envisioned as being comparable to the assistant chair position that is currently held in some departments by a clinical faculty member, and (per the dean’s charge) would provide a key linkage back to the home department of the NTT representatives of the discipline.

Given the nature of the discipline lead position, it would likely be filled by appointment. One might anticipate this to initially occur collaboratively between the Dean’s Office, the corresponding department chair, and the task force, with subsequent appointments would be handled by the teaching unit lead.

Figure 5 represents our collective effort to outline/identify the responsibilities and desired characteristics/skill set of the Overall Teaching Unit Lead.
<table>
<thead>
<tr>
<th>Visionary for Teaching Unit</th>
<th>Faculty Budgetary Issues</th>
<th>AACSB and Faculty Research Agenda</th>
<th>Community Relationship Building</th>
<th>Online Pedagogical Issues</th>
<th>Necessary Skills that Cut across All Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build the brand of the Teaching Unit across all constituencies</td>
<td>Professional Development for conference presentations/travel Equipment procurement</td>
<td>Knowledge of AACSB requirements and procedures Communicate individual and group baseline goals Identify potential pedagogical issues with NTT faculty pursuing research</td>
<td>Business consulting/engagement experiences for NTT faculty Application of faculty Use-Inspired research Project-based coursework opportunities</td>
<td>Familiarity with Best Practices for online course delivery, Blackboard/other course delivery platforms Tech Support Integration including textbook publisher offerings</td>
<td>Highly collaborative Manage multiple deadlines Effectively deal with diverse personalities of academic professionals High trust/integrity and sense of equality across departments Open line of communication/accessibility True love for students with a positive, problem-solving orientation</td>
</tr>
<tr>
<td>Represent NTT at the college level</td>
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<tr>
<td>Develop well-defined overall unit goals</td>
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<tr>
<td>Invest in and develop teaching methods (e.g. workshops)</td>
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**Scheduling**

- Collaborate with Teaching Leads, University Programs Office
  - Develop onboarding procedures and instructional resources
  - Teaching specific awards

**Onboarding, Mentoring and Recognition**

- Dean of Academic Affairs In-house
  - Continue to shape policies and techniques

**Academic Integrity**

- Develop programs to handle increasing number of WPC Honors students
  - Manage dept-specific service roles (e.g. Student Org Faculty Advisor)

**Honors Thesis and Service Roles**

- Develop the process for evaluating in-class performance/setting teaching standards

**Performance/Course Evaluations**

- Figure 5. Overall Unit Lead Position Description

**Moving Forward**

We continue to work with the governance committee to build and mature a structure that will dictate the role of the planned positions.

The task force generally agrees that it does not make sense to hire the area lead until the area, in terms of physical, governance, and management structure, is sufficiently mature so as to allow us to appropriately recruit for the position -- which we anticipate as being close to the proposed Fall 2019 “fully live” date. By default we anticipate hiring or appointing the discipline leads at the same time, though we have speculated on appointing discipline leads sooner so as to allow them to participate actively in the formation of the new unit.

With the above in mind, we currently anticipate hiring both positions during the summer of 2019.
Development Committee

Scope of Activity

The Development committee is comprised of Kathryn K. Eaton, David Shields, Alexia Shonteff and Kelvin Wong. We were given the task to review the new and current employee process to improve the W. P. Carey experience and decided to focus on six areas: Onboarding, Professional Growth, Faculty Mentoring, Culture, Performance Reviews and Recognition. The committee was also responsible for providing possible names for the new area and Nancy Gray was asked to assist.

Goals the Development committee Determined:

- Improve the Onboarding Process
- Improve the Professional Growth Options
- Create a Faculty Mentoring Program Guide
- Provide suggestions for improving Culture/Community of the new location
- Suggestions for possible revamping of the Performance Review Process
- Incorporate an expanded Recognition Program
- Provide a list of possible names for the new W. P. Carey area

Following is a brief overview of the goals and recommendations to achieve the goals with additional detail found in Appendix D of the full Faculty Task Force Report.

Work Done

Recommendations, created through multiple meetings with the Development committee members and Faculty Task Force to address the above goals:

1. Incorporate three additional topics for all new Research, Clinical, Adjunct Faculty to the 4-Hour W. P. Carey Training consideration for a collaborative effort between OAS and expert faculty members (or the new Teacher Group Leader for each department) to be responsible for the new training. The preferred presentation to remain in-person with consideration for 3-5 minute online tutorials for scaling purposes. Consideration to add the ACUE Modules currently being tested by W. P. Carey as a possible series of teaching refinement was put to the side by the committee until W. P. Carey determines its effectiveness. For now, the Development committee determined three additional topics could be immediately included to the current W. P. Carey Onboarding program (please see Appendix D1 for additional information):

6 Also known as the teaching unit
a. Using Technology (Blackboard, Grade Roster, Textbook, In-the-Classroom Technology)
b. Teaching Methods (Best Practices, Using Learning Analytics and Creating Data, Effective Syllabi, Academic Integrity, First Day of Class, How to Drive Discussions, Student Engagement)
c. Quick FAQ’s (Where to go for supplies-batteries, pens,...., Who to Call for Help)

2. Begin a new professional growth series in multiple mediums for all Research, Clinical, Adjunct and PhD Students. Since there are a multitude of opportunities for faculty to garner the AACSB requirements, the Development committee determined these new additions would be based on voluntary participation (please see Appendix D2 for additional information).
   a. Workshop Series
   b. Podcast Series
   c. Lunch and Learn
   d. Webinars
   e. YouTube Channel

3. Establish a Faculty Mentoring Program for all new Research, Clinical and Adjunct Faculty. The program would coincide with the 9 month contract and the new faculty member would be matched to a faculty mentor at the W. P. Carey Orientation (please see Appendix D3 for additional information).

4. To enhance the new W. P. Carey culture and community expansion of Coffee Chats, After School Chats, Tailgates, Retreats and Parties are suggested. A Buddy Program to welcome all new faculty members and foster workplace friendships to be established. New faculty to be paired with a buddy at the W. P. Carey Orientation (please see Appendix D4 for additional information).

5. Require an overhaul of the Performance Review process to better represent the multitude and new (e.g. faculty mentoring) work/services undertaken by the Clinical and Adjunct Faculty to help determine par raises, promotion and multi-year contract eligibility (please see Appendix D5 for additional information). Items to include:
   a. Teaching
   b. Service
   c. Industry Partnerships
   d. Publications
   e. Department Administrative Duties
   f. Other

6. Additional Recognition Awards to include more people at all service levels (please see Appendix D6 for additional detail) at W. P. Carey to include:
   a. Peer Recognition
   b. Teaching
   c. Student Engagement
   d. Master Teacher List (Positive Culture, Dean’s List for Teaching)
   e. Outstanding Faculty Mentor Award
   f. Outstanding Buddy Award
g. Sharing Is Caring (for those willing to do podcasts, workshops…..)
h. Sensible Shoes Staff Award

7. Three names were selected as possibilities for the new area, however, the Development committee believes further exploration with professionals may be necessary:
   a. W. P. Carey School of Business | Catalyst
   b. W. P. Carey School of Business | AU (Gold)
   c. W. P. Carey School of Business | Omnex

Moving Forward

Moving forward we intend to continue to build out and refine the activities we’ve identified above. We may also consider how we might quantify the efforts associated with the expansion of services this represents, and provide guidance on how these proposed activities may impact resourcing. To the extent that these activities represent an expansion in service activity, we must ensure that we plan resources accordingly.
Appendix

The following section contains any additional materials that felt worthy of inclusion but did not necessarily suit the previous sections.

Appendix D: Overview of the Development Committee’s Outreach

<table>
<thead>
<tr>
<th>Onboarding (Appendix D1)</th>
<th>Professional Growth (Appendix D2)</th>
<th>Faculty Mentoring (Appendix D3)</th>
<th>Culture (Appendix D4)</th>
<th>Performance Reviews (Appendix D5)</th>
<th>Recognition (Appendix D6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrate into W. P. Carey Orientation (provide outline of dates)</td>
<td>For all Faculty (Research, Clinical, Adjunct, some for Graduate Students)</td>
<td>Specific to each discipline</td>
<td>For all Faculty (Research, Clinical, Adjunct)</td>
<td>For Clinical and Adjunct Faculty</td>
<td>For all Faculty (Research, Clinical, Adjunct)</td>
</tr>
<tr>
<td>We need our own orientation: - send newbies to WPC orientation - tell people where to go for information, etc - checklist</td>
<td>Best Teaching Practices TedTalk Series Podcast Series Lunch and Learn Webinars Faculty Facebook Professional Growth Funds YouTube Channel Visits to other Universities Conferences ACUE–professional teacher development;</td>
<td>Mentoring Program - how to deal with student issues - syllabus guidance - needs to have taught the same class before</td>
<td>Retreats Coffee Chats After School Chats Family Day Holiday Party Buddy Program - from another department Athletic Tickets for New Faculty(???)</td>
<td>Create New Matrix to Include the new Expectations Multi-Year Review Process Promotion Policy (Bi-Laws were recently changed) AACSB – credentials to teach and accreditation issues Continuing education (e.g. attending</td>
<td>Award for Teaching Master Teacher List (like Dean’s list but for teaching; more than one winner) Award for Student Engagement Award for Innovative Curriculum Design Pay raises - merit increases - squaring up with market rates to help with retention</td>
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<tr>
<td>Classroom Mgt –based on size and type of class</td>
<td>Student Engagement</td>
<td>FERPA</td>
<td>Instructional Resources</td>
<td>Peer Recognition</td>
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<tr>
<td>Match faculty mentors and buddies</td>
<td>Technology Helpdesk</td>
<td>New faculty Blackboard course</td>
<td>New People (Not just CORE classes - required major classes)</td>
<td>9-month long program</td>
<td>workshops, conferences)</td>
</tr>
</tbody>
</table>
Appendix D1: Development Committee - Onboarding - to coincide with faculty contract:

- All new faculty to attend the One Day University Orientation
- All new faculty to attend the current 4-Hour W. P. Carey Orientation
  - General Overview of Expectations in the Classroom
  - What to Expect as an Educator
  - What to Expect from Students
  - FERPA
  - Academic Integrity
- All new faculty to be matched with a Peer to Peer Mentor and Buddy Mentor at the 4-Hour W. P. Carey Orientation (see Peer to Peer and Buddy Programs)
- All new faculty to watch a Video Welcome from Dean Hillman and their Department Chair at the 4-Hour W. P. Carey Orientation
- All new faculty to complete a series of general courses focusing on general information and teaching methods within the first week of hire (In-Person is preferred but an Online option may be something to consider developing)
  - Using Technology (Quick Overview to Get Going)
    - Blackboard
    - Grade Roster (connecting Blackboard and the Grade Roster)
    - Textbook
    - In the Classroom
  - Teaching Methods (Quick Overview to Get Going)
    - Best Practices
    - How to Make Teaching More Successful
      - Using Learning Analytics and Creating Data
    - Effective Syllabi
    - Academic Integrity
    - First Day of Class
    - How to Drive Discussions
    - Student Engagement
      - Capstone Projects
      - Honor’s Thesis
  - Quick FAQ's (Quick Overview to Get Going)
    - Where to go for supplies (batteries, pens,)
    - Who to call/email for Help
- All new faculty to complete a series of courses specific to their area of concentration to be completed over a 9 month period of time - focus will be on REFINING teaching skills/methods in the specific courses being taught. (ACUE Program could be used in lieu of W. P. Carey creating their own series or UNTIL W. P. Carey creates their own series)
  - Undergraduate
    - In-Person
    - Online
    - Hybrid
  - Master
  - PhD
Appendix D2: Development Committee - Professional Growth:

For all Faculty (Research, Clinical, Adjunct and PhD Students)
- Workshop Series to be offered in multiple mediums. Topics to be jointly determined by faculty interest and the person overseeing this responsibility.
  - In-Person
  - TedTalk Series
  - Podcast Series
  - Webinars
- Lunch and Learn (Brown Bag)
  - Can use these for people to practice presentations and get input from peers
- Faculty Facebook
- Professional Growth Funds
- YouTube Channel
- Visits to other Universities
- Attend Conferences

Teaching Leads
- Teaching Leads should have more budget to attend pedagogy conferences and share learnings with their teams

Teaching Award Recipients
- Teaching award winners encouraged to give teaching workshops
Appendix D3: Development Committee - Faculty Mentoring Program:

The intent of the Faculty Mentoring program is to spread best practices throughout W. P. Carey while minimizing the feelings of being overwhelmed and frustrated often experienced by new faculty members. A program to train, support and retain clinical and adjunct faculty.

- **What is the program?**
  - Faculty Mentors serve as sources of guidance and advice for new faculty. Faculty Mentors are more senior faculty members who can offer the value of their experience and connections within the organization.

- **Criteria to Serve as a Mentor:**
  - An experienced clinical or adjunct faculty member and feel that others can benefit from your experience
  - A good understanding of the culture, internal workings and resources available at W. P. Carey
  - Collaborative and cooperative skills
  - Enjoy working one on one with others
  - A positive track record
  - Mentor should have taught the same course (if possible) or the same type of course (e.g. large lecture, online) as the new faculty member;
    - duties not to overlap with those of course lead, meant to complement
  - Mentor will be from the same discipline

- **Duties as a Mentor:**
  - Assist in the new employees' acclimatization
  - Provide professional guidance
  - Answer questions and direct to the appropriate resource
  - Perform in-class observations and provide constructive suggestions
  - Share syllabi, Help with student issues, Etc.

- **Program Content:**
  - Meet for a sponsored one-on-one lunch at latest within two weeks of new faculty start, ideally within one month of hire (even before they show up)
  - Be available to meet to talk about whatever the new employee and Mentor decide
  - Determine the needs of the new employee and focus on those concerns

- **Benefit to Serve as a Mentor:**
  - Counts as service
  - Experience toward career growth (e.g. if you ever want to be a teaching lead, mentoring experience would be required)

- **Term:**
  - 9 Months
Appendix D4: Development Committee - Culture:

- **Coffee Chats**
- **After School Chats**
- **Tailgates**
- **Parties/Events**
  - Retreat (one per year, right before fall semester starts)
  - Include fun getting-to-know-you activities
    - Needs to be related to success factors that can be applied in the fall
  - Family Day
  - Holiday Party
  - End-of-Year Party (Faculty and Staff Awards given out here)
    - Award presenters might be someone other than the leader/dean. Goal is fun, casual event.

- **Buddy Program**
  The intent of the Buddy program is to create a culture of community and welcome to all new faculty members. This program works congruently with the Faculty Mentoring program.
  - What is the program?
    - New faculty are paired with other (relatively) new faculty to help foster workplace friendships between faculty who are at the same place professionally. Buddies should be peers and the goal is to foster community and friendships among faculty.
    - New faculty can opt-out if they already know plenty of people or don’t see value
    - Any faculty (new or established) are welcome to participate
  - Criteria to Serve as a Buddy:
    - Collaborative and cooperative skills
    - Enjoy working one on one with others
    - A positive track record
    - Buddy will be from a different discipline to promote cross-discipline community
  - Duties as a Buddy:
    - Introduce new faculty member around, help make them feel welcome
    - Answer questions if possible
    - Provide an atmosphere of welcome, friendliness, and support
  - Program Content:
    - One-on-one sponsored lunch to help welcome new faculty member
  - Benefit to Serve as a Buddy:
    - Help contribute to positive WPC culture
    - New friends
  - Term
    - 9 Months
Appendix D5: Development Committee - Performance Review (Committees to consist of at least three full-time faculty members):

- **Purpose of Performance Reviews:**
  - Quality Control
  - Advancement
  - Recognition
  - Multi-Year Contract Eligibility

- **Performance Review Criteria:**
  - Teaching (Clinical and Adjunct):
    - Observation of Teaching
    - Student Knowledge Outcomes
    - Student Evaluations (limited basis)

- **Service (Clinical):**
  - Student Engagement
  - Honors Theses
  - BIS Senior Projects
  - Student Organizational Advising
  - Other Student Activities
  - Facilitating/Leading New Training Workshops
  - Mentor
  - Buddy
  - Course Coordinator/Lead

- **Industry Partnerships (Clinical):**
  - Knowledge Transfer
  - Speaking Engagements
  - Serving on Boards

- **Publications (Clinical):**
  - Textbooks (author)
  - Scholarly Book Chapter
  - Business Case Studies
  - Pedagogy Research
  - Newspapers
  - Journals
  - Blogs (?????)

- **Department Administrative Duties (Clinical and Adjunct):**
  - Lead Clinical
  - Other...

- **Other (Clinical and Adjunct):**
  - Serve as an editor or coordinator editor of a scholarly book
  - Serve as an editor or associate editor of top tier peer reviewed publication
  - Serve as elected officer of international or national professional organization
○ Serve as program chair for major academic conference
○ Serve as special edition editor for academic journal
○ Continuing education (attending workshops and conferences, for example (see Professional Growth))
○ Other.....

● **Promotion Policy Suggestions:**
  ○ Promotion Policy - Exceptional faculty should be eligible earlier for promotion to help with retention
  ○ Eligibility
    ■ Probation Period of one academic year before eligible
    ■ Need to meet a certain threshold on yearly performance review

● **Multi-Year Contracts Suggestions**
  ○ Rationale - Offering multi-year contracts can be a way to help us recruit
  ○ Eligibility
    ■ Probation Period of one academic year before eligible
    ■ Need to meet a certain threshold on yearly performance review
  ○ Additional Review Necessary for Multi-Year Contract
    ■ Includes all the same for yearly review
    ■ Departments can determine what more is needed
  ○ Up to 15% of faculty can currently have multi year contracts currently
  ○ We advise to increase this percentage
Appendix D6: Development Committee - Recognition - For all Faculty (Research, Clinical, Adjunct):

- **Everyday Recognition**
  - Peer recognition
    - System where peers can thank each other for help or for going above and beyond. (Peer recognition can come with a small gift card; e.g. $10 to Starbucks.)

- **Annual Awards**
  - Teaching
  - Student Engagement
  - Innovative Curriculum Design
  - Master Teacher List
    - Like Dean’s list but for teaching
    - More than one winner (HOW WOULD WE DETERMINE THIS??????)
  - [Professionals of Practice] Sparky Award
    - Recognize faculty members for embodying the positive culture we are trying to create with this re-org
  - Outstanding Mentor Award
  - Sharing is Caring Award
    - Award for people who are giving workshops, teaching others, etc.
  - Staff Support Award (only for staff)
  - Sensible Shoes Award (because they’re so supportive!)

- **Pay Raises**
  - Merit increases
  - Squaring up with market rates to help with retention