Performance Expectations and Faculty Workload Plan
Jake Jabs College of Business and Entrepreneurship

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SECTION 1: Overview and Guiding Principles

The mission of Montana State University broadly guides the expectations for faculty members’ responsibilities, with adjustments as necessary to fulfill college needs. As faculty members of the JJCBE, we hold positions that are critical to the success of our college and the success of our students. To achieve our goals, we have a shared responsibility to build and maintain a positive culture within our college and to deliver excellence in everything we do.

Our roles are multifaceted. We are responsible for teaching, advising, and advancing knowledge. We contribute our service to our college, our university, our alumni, our professions, and our communities. In all that we do, we should demonstrate the dedication, work ethic, engagement, and participation that we expect of our students, and we should strive to be their role models.

Outlined below are the expectations for our faculty. The primary goals of this document are to establish consistency in workload assignment procedures and to create clarity regarding workload and performance expectations. We can then collectively celebrate successes based on consistent benchmarks and provide fair, consistent, and objective feedback for all members of the team.

SECTION 2: Tenure-Track Faculty

Tenure-track teaching, scholarship, and service responsibilities are allocated as a percentage of the faculty member’s total effort. The effort assigned to an area of responsibility is referred to as “Percentage of Effort” (POE). The total apportionment of POE across all areas will be 100%. All faculty will have a defined POE in each of the areas of teaching, scholarship, and service, distributed such that faculty members have comparable total effort. Modifications to total effort can be made in accordance with the MSU Annual Review Policy, Faculty Handbook, and Faculty Modified Duties Policy.

Unless otherwise specified, the standard performance expectations for a tenure-track faculty member are detailed below. Performance reviews will be assessed based on each criterion. To meet expectations during the year, a faculty member must meet expectations for each category of performance during the year, as well as meeting overall performance expectations.

Teaching – typically 60%, where:

50% of total effort is allocated to teaching. Teaching is composed of classroom activities, class preparation, grading, supervision of independent studies, office hours, and other instruction activities that entail direct student contact. Service and Advising roles may also have regular elements of instruction and student contact but will be categorized according to whether the primary role is student instruction.
Typical Course Load: JJCBE faculty are generally expected to teach five courses (sections) during the academic year. In most cases, this will result in a 3:2 or 2:3 teaching load totaling approximately 15 credit hours per academic year. Courses taught over summer sessions do not count toward the typical course load.

Workload Modifications: The above course load is necessary for the college to fulfill its curriculum and accreditation responsibilities, so deviations should be uncommon. Still, infrequent adjustments may be made to this general schedule to improve workload equity among faculty members or to meet the needs of the college.

The College recognizes that the effort required to teach a course often varies based on numerous factors, including class size, contact hours, grading requirements, etc. However, faculty also commonly adjust their teaching methods in order to compensate for these differences. For this reason, workload is not reduced or increased for reasonable variances in instructional course sizes. However, the college can often provide additional resources, such as grading assistants, to help compensate for the additional challenges associated with larger classes. While knowing that complete equity is not achievable, the college will consider individual circumstances, such as number of class preps, class size, course credit hours, prior experience teaching a course, etc., in making course assignments.

Course releases may be granted on an isolated and temporary basis for unique circumstances. However, ongoing duties in course coordination will generally be considered under the Service category or through adjustment in the faculty member’s overall POE allocations, rather than via course releases. Workload releases are not given for teaching a course for the first time.

Course Assignments: Courses and responsibilities will be assigned by the Dean’s office based on the needs of the college, faculty areas of expertise, and interests.”

External Funding (”Buyouts”): A faculty member who has secured external funding may request a temporary change of appointment (”buyout”) with a reduction in teaching for a semester. Any reduction of classroom teaching due to external grant funding must be approved by the Dean. In general, the single-course buyout amount from the grant or other non-instructional sources must be at least 1/10 of the faculty member’s academic year gross pay and benefits cost.

Overload Payment: In unusual circumstances, tenured and tenure-track faculty may be required to teach a course load that places their total POE above 100% for a semester. Circumstances may vary, but generally, additional compensation of 2.5% of total salary per credit hour taught will be paid as additional compensation for the overload.
Teaching Expectations:

1. Courses should be updated annually to ensure relevance and remain forward-thinking in content.
2. Course design should be rigorous, with an expectation of at least two hours of student homework for each hour of in-class time.
3. For each course (section) taught during the semester, faculty are expected to post and observe two hours of office hours per week, with office doors generally open and inviting to students. Full-time faculty are required to provide 5-6 office hours per week.
4. Within reason, faculty members will accommodate meetings with students outside of scheduled office hours to better accommodate their students.
5. Faculty members will, with assistance from the Assessment of Learning Committee, develop assessment tools for their course learning objectives and will describe both their assessment techniques and any changes to their pedagogy which have been stimulated by the results. The faculty member must demonstrate teaching impact through learner success, learner satisfaction, and other affirmations of teaching expertise.

Teaching evaluations will be based on:

1. Student Outcomes:
   a. Evidence that students achieved the learning outcomes outlined in the syllabus.

2. Faculty Effort:
   a. Course content and design are appropriate for the level of the course, and the content properly fits within the overall curriculum.
   b. Course materials and design are modified continuously to remain relevant and current, along with periodic innovations to pedagogy.
   c. Faculty member is accessible to students with the required office hours and is responsive to students.
   d. Assessment of faculty effort will also take into account independent studies supervised, number of class preps, class size, experience teaching assigned courses, and any other significant factors impacting faculty effort.

3. Student Feedback:
   a. Quantitative and qualitative feedback from students will be assessed primarily via end-of-course feedback.
   b. Assessment of student feedback will take into account class size, course difficulty, experience teaching the course, and other factors that may impact student feedback.

10% of effort is allocated to Student Advising: Every faculty member is expected to advise up to 35 students. Advisors are expected to proactively reach out to their advisees, make themselves available to meet with their advisees, and be knowledgeable about the JJCBE curriculum. Advising also includes periodic advising of students engaged in internships for credit.

Advising Expectations:
1. In addition to scheduled office hours, advisors will reasonably accommodate meetings with students to accommodate their advisees’ schedules.
2. Advisors must be knowledgeable about the required and elective courses in their option and have an understanding of JJCBE policies and processes.
3. Advisors are expected to respond promptly (within 1 business day) to communication from their students.
4. Advisors are expected to build good working relationships with their advisees and other students in the college as opportunities present themselves.
5. Advisors should understand their students’ career interests and backgrounds.
6. Advisors should support each student’s engagement on campus, help them map their campus experience to their interests, and ultimately help them transition out of MSU into a meaningful next step in their lives.

Advising evaluations will be based on:

All JJCBE students will be surveyed each year. Specific questions relating to advising will be included and shared with advisors.

Research – typically 30%:

Tenure-track faculty are afforded the unique opportunity to advance the frontier of knowledge and create impact on our professions and our communities.

Although measuring impact can be difficult, tenure-track faculty have an obligation to achieve minimum research deliverables to maintain our accreditation. As such, each year, faculty must demonstrate that they are maintaining research output that is consistent with our Retention, Tenure and Promotion Guidelines, the AACSB Guidelines, and the MSU Strategic Plan.

Although many of our research productivity measures are currently defined as multi-year, the annual review process is designed to measure annual performance towards achieving or exceeding our multi-year goals. As such, faculty research will be measured annually by research outcomes and demonstrable research effort.

Research outcomes are defined as accepted manuscripts at peer-reviewed journals and funded grant proposals. Demonstrable research effort is defined as development of a research pipeline, submission of research grant proposals, conference presentations, requests to revise & resubmit manuscripts, and submitted manuscripts to peer-reviewed journals.

To meet the annual research performance expectations, a Faculty member must achieve the following:

1. Minimum Research Outcomes:
   a. Remain academically qualified per AACSB standards (two published papers every five years) and the published JJCBE Faculty Qualifications Policy.

2. Expected Annual Research Outcomes/Activity:
   a. One article accepted at a peer-reviewed journal, or
   b. Demonstration of one or more emerging research streams with activities at various stages in the research pipeline, and work nearing publication in a blind peer reviewed
journal (typically, the submission of one or more papers for publication review that have a reasonable probability of eventual publication).

The above expectations are not meant to emphasize quantity over quality. Publications in top journals will be recognized for the necessary time investment required and the prestige and respect they bring to the college and university.

Tenure-track faculty who have low research productivity can be assigned higher teaching loads than reflected above, contingent on positive teaching evaluations that meet or exceed departmental standards. For example, tenure-track faculty who have not met the above minimum research expectations may be assigned a 4:4 (80% POE) or equivalent teaching schedule, with increased service responsibilities (20% POE).

**Service – typically 10%:**

Service efforts include meaningful participation on university and college committees, paper committees, search committees, professional associations, journal review boards, etc. Ongoing course coordination of courses with multiple sections may also be categorized as service. Each faculty member is responsible for actively seeking out service opportunities to meet their service requirement. Faculty will be offered the opportunity to volunteer for service opportunities as openings become available within the college and the university. Faculty are also encouraged to seek and develop external service opportunities, especially those that will serve our university’s stakeholders.

Tenure-track faculty members are also expected to attend mandatory faculty meetings and retreats and at least one commencement ceremony each academic year. Tenure-track faculty members will be given priority for private office space and are expected to spend a majority (at least 20 hours per week) of their contracted time participating on campus and available to students, faculty, and staff.

**Service Evaluations will be based on:**

1. Number and significance of committees, associations, student clubs, and review boards and activity level within each.
2. Assigned course coordination duties, if any.
3. Participation in college faculty meetings, retreats, and commencement activities.
4. Peer feedback and award nominations.
5. Meeting contracted service requirements by devoting at least four hours per week, on average, to service activities throughout the term of the academic contract.

If a faculty member does not demonstrate service activities commensurate with their workload obligation, the Dean’s office may assign service roles, if available.

**Documentation of Performance:**

Each faculty member is responsible for demonstrating that their performance meets or exceeds their workload requirements. Activity Insight will be the primary means of documentation, and each faculty member is responsible for logging teaching, research, and service activities and developing a self-assessment report for annual reviews. Successful annual reviews require submission of all required materials by the stated deadline.
SECTION 3: Non-Tenure-Track (NTT) Faculty

NTT faculty performance expectations are defined by the collective bargaining agreement. In any case of unanticipated conflict between these workload expectations and the collective bargaining agreement, the collective bargaining agreement will be honored without question.

For NTT faculty members, 30 work load units (WLU) per academic year (excluding summer) represent 1.0 full-time equivalent (FTE). WLUs can be derived from courses taught at MSU or a combination of courses taught and additional duties (e.g. student advising, committee membership, club advising, etc.).

For the purposes of this document, a “participating” JJCBE NTT is defined as any NTT faculty member receiving university benefits granted for continuous workloads of at least 0.5 FTE per academic semester (excluding summer) and actively participating within the college. NTT faculty in the JJCBE are eligible to be considered for additional duties in a semester in which they’ve been assigned 0.5 FTE or more WLUs of teaching in the college.

NTT faculty are selected to join the faculty based on the relevance of their professional experience. As such, NTT faculty are expected to remain current in their respective fields of expertise and to incorporate their specific domain knowledge into their teaching material. Information about maintaining currency can be found in the faculty qualifications policy.

Participating NTT faculty are expected to attend college retreats, faculty meetings, and commencement activities, as their MSU and external work schedules permit.

Part-time NTT faculty members (less than 0.5 FTE) are encouraged to participate in college and university activities, as their schedules permit, but are not typically assigned service activities. Part-time NTT faculty members are invited to attend all faculty meetings but are not required to do so. Part-time NTT faculty members are encouraged to participate in college activities such as commencement, student events, student clubs, recruiting efforts, and student retention events on a voluntary basis, as their schedules permit.

Full-time NTT faculty members will be given priority for private office space and are expected to spend a majority (at least 20 hours per week) of their contracted time participating on campus and available to students, faculty, and staff.

Teaching Expectations:

1. Courses should be updated annually to ensure relevance and remain forward-thinking in content.
2. Course design should be rigorous, with an expectation of at least two hours of student homework for each hour of in-class time.
3. For each course (section) taught during the semester, faculty are expected to post and observe two hours of office hours per week, with office doors generally open and inviting to students. Full-time faculty are required to provide 5-6 office hours per week.
4. Within reason, faculty members will accommodate meetings with students outside of scheduled office hours to better accommodate their students.
5. Faculty members will, with assistance from the Assessment of Learning Committee, develop assessment tools for their course learning objectives and will describe both their assessment techniques and any changes to their pedagogy which have been stimulated by the results. The faculty member must demonstrate teaching impact through learner success, learner satisfaction, and other affirmations of teaching expertise.

Teaching evaluations will be based on:

1. Student Outcomes:
   a. Evidence that students achieved the learning outcomes outlined in the syllabus.

2. Faculty Effort:
   a. Course content and design are appropriate for the level of the course, and the content properly fits within the overall curriculum.
   b. Course materials and design are modified continuously to remain relevant and current, along with periodic innovations to pedagogy.
   c. Faculty member is accessible to students with sufficient office hours and is responsive to students.
   d. Assessment of faculty effort will also take into account independent studies and internships supervised, number of class preps, experience teaching assigned courses, course coordination duties, and any other significant factors impacting faculty effort.

3. Student Feedback:
   a. Quantitative and qualitative feedback from students will be assessed primarily via end-of-course feedback.
   b. Assessment of student feedback will take into account class size, course difficulty, experience teaching the course, and other factors that may impact student feedback.

Service Evaluations (when assigned and applicable) will be based on:

1. Number and significance of committees, associations, student clubs, and review boards and activity level within each.
2. Peer feedback and award nominations.

Documentation of Performance:

Each participating NTT faculty member is responsible for demonstrating that their performance meets or exceeds their workload requirements. Activity Insight will be the primary means of documentation, and each faculty member is responsible for logging teaching, research (if applicable), and service activities and developing a self-assessment report for annual reviews. Successful annual reviews require submission of all required materials by the stated deadline.

Part-time NTT faculty members will be evaluated primarily via student course evaluations, course syllabi, and teaching observations, when possible.