

Statement on Balancing Teaching, Research and Service Contributions for Tenure-Stream Faculty Members

All tenure-stream faculty members at McMaster are expected to contribute fully to the life of the institution through a combination of scholarship, teaching and service. We have traditionally defined this as an equal weighting on scholarship and teaching with a lower weight assigned to service. For processes such as CP/M we define this split more precisely as 40:40:20. There are however lots of variation to this standard. Faculty members who serve in administrative positions for a period of time carry lighter teaching responsibilities and may also see a reduction in research productivity. In addition the interests and abilities of faculty members will lead some to focus more keenly on research, others more on teaching. There are lots of examples in which faculty members, whose focus on research has lessened over time, have balanced this by picking up an additional course or two. There is a lot to be gained, both institutionally and by individual faculty members, in a flexible approach to the ways in which each faculty member contributes to the university mission.

There is one fundamental aspect of the teaching / research / service spectrum that needs to be acknowledged. Research and scholarship are generally self-regulated. Tenure-stream faculty members are expected to engage in research and scholarship, to publish, train graduate students and the like. However, the amount of such activity is not assigned by the chair^{*}; rather, it is left to a faculty member's discretion. Teaching on the other hand is largely assigned by the chair. For this reason we typically refer to the level of teaching activity as a "load", a somewhat pejorative term. A better way to describe this would be as the teaching contribution. This term also recognizes that while most teaching responsibilities are assigned, some are not. A good example of the latter is the supervision of undergraduate theses and projects. Another is the supervision of graduate students which straddles the boundary between teaching and research. Service contributions can be both assigned and self-regulated. Most faculty members are assigned to committees that support the business of the institution. However, many also volunteer to sit on ad hoc committees or run for elected positions that are vital to the successful operation of the university. Yet others participate in community engagement work. Many faculty members also take on administrative functions (e.g. as departmental chairs or associate chairs) for a period of years.

For McMaster to be successful and to continue to grow in stature we must ensure that each faculty member is contributing materially to the life and work of the university. The standard letter of offer to tenure-stream faculty members indicates that the teaching contribution expected will be assigned by the chair. The level of expectation is not indicated. There are however, norms that vary somewhat with Faculty. Likewise

^{*} For the sake of simplicity in this document the term chair is meant to include director.

there are norms in terms of research engagement and output which vary even more from one Faculty to another. Within these norms the chairs have a responsibility to determine how best to balance the contributions expected of each faculty member. Given that, as already noted, research is largely self-regulated while teaching and service contributions are wholly or partly assigned, the process of balancing contributions largely takes the form of adjusting expectations as to the latter two areas.

As a consequence of the above several Faculties have developed guidelines for the assignment of teaching and service contributions that are to be used by chairs in a fair and equitable process. They all indicate that when a faculty member's research productivity is low, as measured by the norms of the Faculty and department, they should be expected to compensate through additional teaching or (occasionally) service. There are some conditions on this change in assigned duties. First of all, the balance of research, teaching and service expected of a tenure-track faculty member should not generally be altered while their tenure decision is still pending, and only then with their expressed written consent. Faculty members whose assigned teaching or service contributions are to be increased should be notified in writing in advance by the chair and/or dean. Faculty members whose assigned teaching, research and service responsibilities have been changed may be awarded CP/M using a formula that is weighted to more accurately reflect their new balance of responsibilities. The process for making this change will involve the faculty member, chair and Dean. Subsequent changes in the faculty member's assigned contributions should be documented in writing from the chair and/or dean. A record of all the changes described above should be kept in the Dean's office.

Many Faculties have or will develop guidelines that assist chairs in assigning responsibilities to individual faculty members. These guidelines will account for the differences in norms and approaches across the institution. However, it is expected that all such guidelines will live within the spirit outlined in this document

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