Swimming with Teddy Bears and Sharks: Changes to a Tenure, Promotion, and Merit Award System within Resistant Institutional Structures and Interests

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Abstract

In 2017 the Faculty of Education (FoE) at Simon Fraser University engaged in a research-based review of its Faculty Tenure and Promotion (FTP) guidelines in an effort to better understand the scope of scholarship, teaching, and service within the faculty; to provide recommendations for how the quality of scholarship, teaching, and service might best be evaluated; and to better define the evidence that faculty members might provide the Faculty Tenure and Promotion Committee (FTPC) for assessing each of these components of academic work. This paper offers an account of the changes made—which were specific to our faculty but involved elements common in other faculties and at other universities—and the various personal and institutional constraints at play throughout the process. We highlight three different scales at which we worked that relate to issues of equity and inclusion, personal autonomy and self-motivation, and the fantasy of the objectivity of numbers. Since we have come to see the institution as the resistant milieu and therefore our work as challenging institutional structures and norms, we frame our process in terms of multiple acts of refusal. We show how these acts relate to an integrated model of policy analysis and explore our continuing efforts to implement these changes to advance principles of equity, inclusion, and diversity in our faculty and in our work. While the story is told by the four authors of this paper, we are representing the important work done by a broader team of seven who engaged in this work.[1]

Introduction

Within the academy, like many workplaces, there are the urban myths that perpetuate, in some essence, the hidden curriculum of what it means to "be" an academic. This article explores how the narratives of our work as faculty in the Faculty of Education (FoE) at Simon Fraser University (SFU) were differently valued within our faculty community; how tensions between markedly different perceptions and measurement of excellence awarded a diversity of research practices in our community were corroding collegiality; and how, in response, we went about challenging the academy in our struggle for change. The work reported here stems from a year-long effort to understand the values of the SFU FoE as a community and to ensure those values are reflected in one of our core governing documents, the Faculty Tenure and Promotion (FTP) Guidelines which outlines the criteria for faculty salary review, tenure, and promotion.

In examining the FTP guidelines, we also sought to examine the processes of the enactment of these guidelines for tenure and promotion, and merit review by asking the following key questions:

- How do we communicate what is valued in being a scholar and how is this evaluation actually being taken up in the merit review process?
- How can we make visible what is hidden, assumed, or "reproduced" in our narratives, both in stories we tell and in policy interpretation and implementation?

We begin our paper with two stories—an "urban myth" that existed (and persists) in the FoE and one told by Euripides. The first helps us share the context of our work, and the second provides a framing for how we choose to tell our own stories of enacting system change. Following these two stories, our paper is organized into four sections: our narrative introduction; the story of who we are and what we did; reflections on the theories that informed our work; and exploration

of the implications we see for faculty at other universities. As illustrated by our opening, we are four faculty members from a broader team of seven that engaged in this work. We came to the work with different values and reasons for engaging and you'll hear the different choral voices as we share our story.

Are You Swimming with the Teddy Bears or Sharks?

The academic culture of raising your profile to be the "best" in many ways runs counter to a competitive merit system in which you do the "best" but are then measured against an "average" based on a ranked merit "pool." Given the size of our faculty, our merit pool is divided into two different groups based on one's year of hire. In this randomization of competitive merit pools, the FoE myth of "are you swimming with the teddy bears or sharks?" lives.

In this FoE myth, Teddy bears are defined as scholars committed to their research, teaching, and service. Like cartoon teddy bears, though, they are the gentle doers and helpers in the Faculty—and yet, at times, under our previously-established criteria and practices, they are marked as doing service at the expense of research and to their detriment during evaluation. Notably, many of these so-called Teddy Bears are also leaders and practitioners in participatory action research, community-based research, research creation, and Indigenous practices of inquiry, which require significant time between connecting and building a relationship with communities of inquiry and offerings in forms resonant with one's work. Unfortunately, through the existing evaluation process, interest in and service to communities in ways that are integral to one's scholarship are erroneously deemed as harmful to scholarly productivity.

On the other hand, Sharks are defined as high-performing scholars who win research grants and publish in "high impact" publications, often in multiple authorship with their students. While some sharks may also be engaged in service and/or participate actively in collegial governance,

inevitably, the value of their scholarship is based primarily on their publication record and dollars funded. Thus, they are rewarded for having "more contribution" or "value," reifying the story that only the right kind of research and the frequency of publications matter. Many of these sharks are also working from long-established research trajectories and positions of rank and privilege, conflating inequities in resources and capacity with quality and impact.

Am I a shark or teddy bear? I learned after my first or maybe second merit review that I was a teddy bear swimming with the sharks – that despite having an average number of publications, receiving grants, and maintaining heavy supervision and service commitments, I would really never get beyond the average step increase despite feeling like I had given absolutely everything to be the "best" academic possible. It was devastating to be told I'm only average – I got over it (almost). Still, the systemic biases were all too evident to me as I navigated the process of contract renewal, merit, and then tenure and promotion as an Indigenous scholar embedding my own values and ethics to my work of being in the academy. I'm a proud teddy bear, I know I can swim with the sharks and that being average is actually an outstanding accomplishment – that took a long time for me to learn – and that I don't need to become a shark to thrive in the academy. ~ Michelle

Am I a teddy bear swimming with sharks? When I was hired, the question everyone asked was which merit pool was I in? I don't know, I said. "She's in with the sharks," someone said. Sharks?! I imagined a bloodied pool, and I, an arts-based teddy bear dog-paddling for life. Five years later, I received a merit increase, lower than previous years. Surprised, I asked if I was not being recognized for the multi-authored papers I had published the past two years? Oh no, I was told, such

scholarly collegiality is welcomed in our faculty; it's just easier for the FTP

committee to *count and compare* single-authored papers. Merit impacts salary and

retirement. My merit step was increased. What if I had not inquired? ~ Lynn

There are really no winners in these stories of swimming with teddy bears and sharks; in fact, there are multiple layers of such whispered and hidden stories to unpack beyond the scope of what we can do in this article. This battle between the "sharks and teddy bears" for recognition among their peers serves as an indicator of a corrupted collegial culture that our competitive comparative merit system has reinforced and promoted.

There are sharks and teddy bears who populate each pool, so another lesson from this story is that it doesn't matter what pool you are swimming in. But it does matter who is fishing (i.e., undertaking faculty merit review). In many ways, the language of our tenure and promotion criteria is quite flexible; however, those selected to review faculty performance on the FTPC often bring to the work their own understanding of what *should* be valued. Thus, what has been created is a competitive comparative merit system built on unwritten rules, in some essence, socially constructed rules and values of what it means to be in the academy.

If we value equity, diversity, Indigeneity, *and* community as a faculty, then we need to critically examine not just our policies, but also our practices (how we live those values) that perpetuate inequities and diminish community. Thus, we pose these questions: What is valued? And by whose definition? To whose benefit? In our process, we are guided by the values of wellbeing and belonging, and most importantly, recognition that scholarship in the 21st century cannot and *should not* be measured by conventional criteria that undervalue the unique contributions of individual scholars.

Scholarship is enacted in a variety of ways that require different kinds, practices, and forms of engagement, all contributing to academic excellence. In our work here, we are inspired to a full-hearted dismantling of a competitive comparative merit review system, one that has detrimental impacts on one's sense of worth, belonging, appreciation of diversity, community wellbeing, and yes, individual career trajectory. Doing the work that one is passionate about in research, teaching, and service should be enough—full stop. We went into this work wanting to ensure we are all valued for what we contribute. Equity dwells in the diversity of offerings each scholar brings, and all are valued.

Euripides Foretells Our Academic Venture

The second story we tell is framed through Euripides' 5th-century tragedy, *The Bacchae*, which can be read as a story of challenging institutional norms and practices. Dissatisfied with the King's ongoing insistence that the women of Thebes continue their labour, working at looms and bearing children, three sisters—including Agave, the King's mother—decide to leave the city and set up a new way of life in Cithaeron. There they pursue new activities, such as resting and playing and chanting, thereby refusing the King's tyranny. They also alter some of the prior activities, by breastfeeding the animals, for example, rather than their own children and hunting with their own hands, rather than with the tools that the men from Thebes use. They also (accidentally?) kill the King. They subvert taken-for-granted roles and create novel ways of living, of interacting with their environment.

For this reason, they are often seen as crazy or mad in conventional readings of the play. However, they eventually decide to return to the city, hoping to reclaim their proper place there, to transform the city through collective chorus. But, since they have killed the king, they are then expelled from Thebes, left to wander waywardly.

Several feminist scholars have offered different interpretations of the story, questioning its reading as a tragedy, and depathologising the three sisters. For example, the feminist scholar Bonnie Honig (2021) has drawn on Euripides' play to propose a theory of feminist refusal, shifting interpretation away from the patriarchal, moralistic reading of mad bacchants. Honig sees leaving the city is one mode of refusal, which she calls inoperativity for the way that it not only refuses normative use-value but intensifies it into new pleasures. The second mode of refusal, which Honig calls inclination, involves a shift from maternity to sorority, which the bacchants achieve by refusing the filiality of maternity, which reproduces patriarchy, and instead pursuing a more egalitarian kinship of sorority. Finally, the third act of refusal—that of fabulation (a term used by feminist Black scholar, Saidiya Hartman, in her reading of *The Bacchae*)—occurs when the bacchants return to the city, in chorus, seeking or perhaps imagining choral reverberation rather than replacement. But patriarchy prevails. Instead of seeing the return as a tragic failure of the bacchants, however, Honig invites a polyphonic interpretation in which (1) exile is a gift, (2) failure operates as fuel for new fabulations and (3) the failure is that of the city's, which is not yet ready for the sisters.

We bring this polyphonic reading of *The Bacchae* into play here for the way that it speaks to different modes of refusal—refusals that go beyond simple retreats (refusing to do anything of value), or refusals that ignore the agon of change (recognising that upending patriarchy might be costly for filial relations) or play by the normative rules (which reproduce existing inequities). We use it to structure our story, both in chronological terms, but also in political ones.

The Bacchae (our story)

We started our paper by sharing two stories that introduce the narrative of our faculty and our journey—a narrative that historically pitted perceived "high-achieving" academic sharks

against the perceived and othered "rank-and-file" teddy bears in the defining of excellence and the allocation of rewards. Over time, the tension between the teddy bears and the sharks—between the winners and the losers in our evaluation system—created an environment of privilege, misunderstanding, pain, and frustration that helped us realize that change was necessary. To explore that change, we embarked on a journey that, like the bacchants, had us step away from the society in which we were embedded, and through research explore our values and the values and practices of other cultures to ultimately construct a vision of a reality that we felt supported both equity and excellence. It's a journey we are still navigating.

Thebes (or the Faculty of Education at SFU)

The Faculty of Education at SFU is a non-departmentalized faculty of approximately 80 research and teaching faculty as well as a similar number of seconded teachers responsible for teacher education through the Professional Development Program (PDP). Academic governance, including promotion and tenure review, as well as biennial salary review (merit review), falls under the purview of the 80+/- research and teaching faculty and was governed by the collective agreement (Simon Fraser University Faculty Association and Simon Fraser University, 2014) as implemented through the faculty created and adopted Criteria for Tenure and Promotion (SFU Faculty of Education, 2018). At the time, our Faculty Tenure and Promotion Committee (FTPC) was comprised of colleagues across the Faculty, including a chair (at associate or full rank), and five other members (across the six members, one seat is reserved for a pre-tenure faculty member, another for a limited-term faculty member, at least two full professors and at least one associate professor).

Faculty accomplishments at SFU are reviewed on a biennial schedule, and in the FoE that means that 35+/- faculty members are up for merit assessment by the FTPC every year. The FTPC

also assesses applications for tenure and promotion as they come up. The FTPC evaluation of each faculty member includes the recommendation of salary steps running from 0 – 2 on a half-point scale (so, a 0, .5, 1.0, 1.5, 2.0). A salary award of 1.0 under this system is generally considered an average performance.

When we began our work, the collective agreement specified that the funding for biennial salary reviews was to be allocated to faculties at 1.3 steps per member, creating a mathematical dissonance between funded and awarded steps[2]. This dissonance resulted in a structurally unequal system as it was impossible to reward all faculty with the same step increase. This structural inequality forced the FTPC to evaluate faculty members competitively against those in the same pool for step awards during biennial salary reviews and rank candidates from high to low in allocating steps.

Over the years, the faculty has expanded substantially, building a wide range of methodological and subject area expertise (such as psychology, leadership, curriculum theory, French education, arts education, equity, diversity and language studies, environmental education, international education, Indigenous education, math education, technology education). Because of this diversity in research approach and content knowledge, the FTPC often struggled to understand the significance of work completed in domains other than their own. In an effort to ensure impartiality of assessment when qualitative understanding of work output was limited, the FTPC generally worked to quantify faculty work so that it could be compared, ranked, and reported— this included counting publications, totalling research funding received, and averaging scores on standardized student evaluations of teaching. Additionally, while not codified in the collective

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[2] While merit steps were provided to faculty in this manner, salary steps awarded at the time of earning tenure or promotion were funded separately, meaning that candidates for tenure and promotion did not compete against each other for steps, nor did tenure and promotion steps reduce the funding provided for merit review.

agreement, faculty work was perceived to break down into 40% teaching, 40% research, and 20% service. Because meaningful service was difficult to quantify, it often took on even less importance than the 20% figure might suggest and indeed was often reported as a distraction from teaching and research productivity in salary review letters.

This forced inequality was the basis for substantial confusion within the Faculty, as members attempted to reconcile their understanding of their own performance with their placement on the salary step hierarchy by the FTPC. As illustrated by the story of the Teddy Bears and Sharks, many competing narratives arose as faculty tried to make sense of the biennial salary review system. These narratives included the definition of productivity as based on the number of research publications reported by each faculty member, the polarization of teaching evaluations (recognizing primarily the highest averages or penalizing the lowest averages), and the general disregard of graduate supervision (defined as a teaching function) and service.

Dionysus (a God in Pain)

While the evaluation narratives built up over time, the confusion, frustration, misunderstandings, and pain felt by many community members became apparent at a faculty retreat in 2016. Many members of our community, particularly those in equity-seeking groups and demonstrating diverse academic contributions, shared that they felt their contributions were not adequately recognized by their peers.

This conversation continued and when our tenure and promotion criteria came up for renewal in June 2017, it became apparent that a deep review was necessary. That summer the Dean of Education (Kris Magnusson) established an ad hoc FTPC Guidelines Review Committee (GRC) to address the scope of scholarship and teaching within the Faculty of Education; to provide recommendations for how the quality of scholarship and teaching may be assessed; and to

delineate faculty member responsibilities for providing evidence in support of their scholarship and teaching (note that service was not mentioned). The committee was to have at least one member from each rank, but other than that, as many people as interested were invited to join the effort. Seven of us stepped forward and at our first meeting, Dan Laitsch was elected to chair the committee.

The Bacchants Have Left the City

Each of us came to the work of the GRC for our own reasons and with our own thoughts about how to approach our work. While we can't tell the story of all of the bacchants in this play, the three of us writing here feel it is important for us to share our own motivations for taking on this work.

Dan's Lens.

My background and interests lie in policy, research use, and leadership. In particular, my interests focus on the use of research and evaluation in improving policy and practice. Because of my focus on change and improvement, I'm also interested in motivation and what drives people to make a change. While the role of extrinsic incentives can be quite powerful in driving change, I also believe that using policy to coerce change through allocation (or restriction) or rewards can result in substantial unintended (and contraindicated) consequences. This observation led me to an interest in Self Determination Theory (Ryan & Deci, 2018)—an empirically based theory in psychology that posits individual wellbeing is based on our autonomy (our actions arise from our own volition and willingness); competence (our ability to exercise, expand, and express our capacities and talents); and relatedness (having a sense of belonging). To me, it was apparent that our evaluation system was negatively impacting each of these areas, as faculty autonomy was limited by the extrinsic structures of our biennial salary review system; our competence was

challenged by the way that work was (or wasn't) being valued; and as a result, many members felt a lack of membership (belonging) in our community.

As chair of the committee charged with reviewing our tenure and promotion policy, I loosely adopted the integrated model for policy analysis (McKenzie & Wharf, 2016) to guide our work. The model starts with *problem analysis* (what is the problem and how is it framed) and *goal specification* (what are we trying to achieve), and requires identification of our *value criterion* (what it is we value as we make change). It requires a *feasibility assessment* in exploring alternatives and ultimately results in *recommendations* for change. Throughout the process, it was also important to me that our work be based in research—that is that we would collect data to inform our work, rather than relying on past practices or popular wisdom.

Michelle's Lens.

At the day of my interview, it was clearly communicated to me that "you don't need to be a great teacher, just a good teacher" … "you want to make sure you have enough "A" publications (i.e., peer-reviewed), and don't focus too much on "B" (book chapters) or "C" (other types of publications)". These unsolicited words of advice set the tone of what was expected of me as a scholar. I was working 60+hr weeks those first years of pre-tenure – doing all the things I thought were important for being a good scholar across all aspects of my work – teaching, research, and scholarship. I was engaged and I saw it as a responsibility to collegial governance and how I wanted relationality, as a core personal value, to be infused into my work as a scholar.

I also sat on the TPC committee first as an assistant professor to "learn" about the process and the system; I then sat once again on the committee post-tenure to serve in the interest of equity and making sure what was valued in our community and collective agreement was reflected in the work done by the committee. Sadly, I frequently witnessed discussions of personalities or "non-

traditional" types of scholarship being disvalued/disrespected. I understood that being non-departmentalized meant that many of us bought into this work how we were trained during our doctoral programs and by what was valued our specific disciplines – no wonder there was a clear lack of understanding of how to value and respect the different types of scholarship and knowledge mobilization undertaken by our colleagues. Those doing community-based research, Indigenous research, research creation, and/or equity/advocacy/social justice research result in diverse forms of knowledge mobilization were being unfairly treated in these processes. I joined the FTPC ad hoc committee to support a change that saw more equity in not only our policies but the enactment of those policies at the FTPC committee level.

Nathalie's Lens.

As former member of the FTPC, and then its Chair, I had been asked by the Dean in 2015 to be more explicit in including the three components of faculty work, namely, research, teaching and service, in the review process. Previously, since almost all faculty members received very strong teaching evaluations, and since most faculty members were involved in many different forms of service (which made them difficult to compare, especially when some of them were renumerated), research became the main differentiator. Even with this single variable, it had been challenging to compare the pool of approximately 35 faculty members. This had led to a privileging of research output, with a method of counting and scaling each type of output (peer-reviewed journal articles worth twice as much as chapters, etc.). The assessment therefore involved counting weighted values, producing a score that could then be easily ordered in order to correspond to the steps described earlier.

In an effort to start "counting" more than peer-reviewed publications, I introduced a new system in which each faculty member was rated according to research, teaching *and* service. This

system did reward particularly strong teaching and service, but it also decreased the variation of between scores, making ranking all the more difficult and eventually leading to research performance (number of research publications) ultimately outweighing teaching and service. Although we had all spent more time assessing each faculty member, we were still defaulting to traditional measures of success (which may in place precisely because they are countable!). Mathematics (and number in particular) was being used as a tool of objective evaluation and comparison, but the numbers had lost all validity (averaging numbers to create a single value, for example, assumes, for example, that all three aspects of a faculty member's work are mutually exclusive) and reliability (how much does a book count for? A policy report? A performance?). I joined the ad hoc committee in order to explore new ways of thinking about FTPC work that could make better use of our time, and more valid ways of valuing, recognising and supporting faculty members' contributions.

Lynn's Lens.

Each year, I watch the sails of friends sailing the seas of scholarship empty of wind whenever the FPC merit steps are announced. I confess, I have sidestepped the responsibility of sitting on the FPC committee, unwilling to commit so much time and number-crunching, to being responsible for the impossible and unscholarly task of *comparing* colleagues' scholarship. One day, during a faculty meeting, a colleague told me that all I had to do to succeed was to prove that my scholarship as an arts-based scholar was scholarship. I was furious. Despite my 20 years of publishing, to be told that I still had to validate my chosen form of research was infuriating. "Perhaps," I hotly replied, "now that we are in the 21st century, it's time to look at the reliability, validity, and rigour of quantitative research!" In the uncomfortable gap between, I wonder how we will ever walk the continuum towards each other.

How do we measure success? What is success? "Look at the word 'evaluation,'" I ask my undergrads, "and brainstorm, in teams, all the words that come to mind in five minutes." The majority of words offered are punitive, anxiety-ridden, with only a few positive words like reflection, growth, learning scribbled in between the calligraphy of educational angst. Is this our experience of Education?

"Do you see the word "value" in Evaluation?" I ask. "What do you value, and why?"

And how do we understand the work our colleagues are doing? Service can be a form of research, where new courses are created, new policies enacted. Currently, I am researching mentorship. During a recent conversation, I was introduced to the term, 'onboarding'. "What fun! What kind of boat are we on?" I asked. "A canoe? A sailboat?" Their response was quick! "A first-class cruise liner!"

We are shaped and measured by the metaphors we choose to define us. Thus, when the request for faculty to join a committee to review the FTP guidelines was announced, I volunteered. I wanted to be part of the conversation. I wanted "Teddy Bears" to be recognized for their innovative and vigorous scholarship embodied in a diversity of forms and practices from community-based engagement to journal publishing to releasing podcasts to walking with graduate students—creating spaces for new voices and new ways of being in community and research. *This too is possible*. As a colleague once asked me, "How do you measure a child's smile?" Or a colleague's tears? And what is the consequence of our response?

The Work

The GRC began its work in September 2017. We met as a committee six times and worked by e-mail and through a Canvas website. We adopted a community-based research approach to the work, treating our Faculty as the community of interest. We gathered data in multiple formats

across five phases: *problem analysis and goal specification; identification of value criterion; assessment of alternatives; exploration of what was feasible; and presentation of proposals for change for ratification.*

The first phase focused on surveying the community regarding their beliefs and values regarding assessment, biennial salary review, and tenure and promotion. We presented the survey results to the faculty and followed up that presentation with a focus group and individual consultations with committee members. The results of that data gathering and consultation formed the basis for our *problem analysis and goal specification* phase.

As a committee, we also discussed at length our individual values and the values we heard the community expressing during the consultations. We used these values to *identify the value criterion* for our policy work.

In the next phase, we explored the *alternatives* available in the grand panoply of tenure and promotion policies by reviewing all of the TPC policies in place at SFU. We also gathered TPC criteria from comparator institutions across Canada, to see how our peers treated merit review and tenure and promotion. During this stage, we also reviewed the existing research base on faculty evaluation. Our investigations greatly expanded our understanding of what was possible in faculty evaluation.

Building on this work, the next phase entailed us returning to the community to share our findings across these areas. This consultation helped us understand what was *feasible* as we moved into the recommendations phase. We explored three options in our consultation with the community: keeping things the same, making incremental changes in line with our values, or engaging in more radical change. Ultimately, we took the latter approach and proposed some fairly radical—at least for some in our community—changes in both policy and practice.

The final phase was to revise our evaluation policies and make recommendations for change to the community. As part of our mandate, all policy changes and recommendations were to be presented to faculty for discussion and voted on for ratification.

Outcomes.

While the discussions of the committee are confidential, as are the individual responses to the survey, focus groups, and consultations, analyses of this work were presented to faculty at faculty meetings and in public forums. We share the outcomes of our work by pulling from these public presentations and discussions.

Problem analysis and goal specification.

In the first phase of our work, we decided to ask the members of the community about their feelings regarding our evaluation system. We surveyed faculty across 18 items (ten open-ended qualitative questions and eight closed response quantitative items), with a response rate of 55-60%. The full presentation made to faculty of the survey data (Dharamshi et al., 2017) is beyond the scope of this paper but is available by request to the authors. Generally summarized, respondents were much more satisfied with the criterion-based tenure and promotion processes than the comparative biennial salary review and did not see the current system as reflective of their values. Respondents strongly believed the system emphasized competitive merit but did not believe competitive merit should be of primary importance. While respondents saw more value in the idea of merit assessment for holding their peers accountable, they saw little value in merit for either their own work or for the actual accountability of their peers.

In comparing responses across items, the less satisfied faculty were with the current system, the less they saw that system reflected their values and the more likely they were to think that merit is strongly emphasized. The less satisfied they were with the current system, the less likely they

were to think that merit based on competitive comparative measures should be emphasized and the more likely they were to think that other recognition is needed. The less satisfied they were with the current system, the less they saw it as useful for accountability or as motivating in biennial salary review. One overarching observation regarding the qualitative comments on the merit system lies not in what was said, but in what wasn't said. There were only a couple of comments that mentioned teaching or service, with almost all respondents conceptualizing merit as being based on research productivity (whether they were supporting or critiquing the system). No respondents conceptualized the recognition of merit as an instructional or service-related construct.

In exploring satisfaction with the evaluation system, respondents offered 73 unique responses that fell into four major themes: lack of value of diverse forms of contributions that faculty work entails; lack of transparency, communication, and mentorship; individual exercise of politics and power; and FTPC structures and procedures that seemed more focused on efficiency than accuracy and equity.

Key to our work was an exploration of the faculty's values, and we gathered qualitative data on this question. There were four major themes in written comments about faculty values. The largest body of comments was focused on collegiality and community, with respondents in this area emphasizing the diversity of scholarship, equity and fairness, community engagement, and treating each other well. People here talked about a desire for "celebrating each other" and the need for a "commitment to the collective wellbeing of faculty." A smaller body of comments focused on a more conventional view of faculty work, emphasizing excellence in research, teaching and service, with research measured by peer review and publication, made up the second theme. A third theme, application of our values, seemed to provide a bridge between these two visions, as respondents appreciated our current standards, but struggled with how we interpret,

adjudicate, and apply those standards. Respondents in this strand noted the "document is not the problem, but rather its implementation" in part as FTPC members may struggle to "find a way to respect approaches to scholarly work, research and teaching that are dissimilar from their own personal preferences." In part, this led to a belief that there is little "clarity about how quality is adjudicated" and that the "issue is less the criteria than the people on the committee. As one respondent asked, "In what ways are faculty [on the committee] trained to think about diversity and equity?"

The survey was followed up with a focus group and invitation for individual consultation on the survey results. No new themes were identified during the focus group or consultations, but some individuals shared stories of trauma experienced through the evaluation process and helped us better understand their lived experiences, further motivating us to do better for our faculty community.

As a result of this work, we identified a series of problems. First, the competitive structure of the merit review was a significant contributor to faculty dissatisfaction. Second, there was a disconnect between faculty values (diversity of scholarship, equity and fairness, community engagement, and collegiality) and the standards, as either stated or interpreted by FTPC. Third, a lack of formal mentorship contributed to challenges with communication of standards and transparency of evaluative decision-making. Finally, this lack of transparency and clear communication resulted in perceptions of bias, the exercise of power, and procedural unfairness.

Identifying value criterion.

When analyzing policies using the integrated model, McKenzie and Wharf (2017) identify common value criteria that can be applied to the analysis, including efficiency (cost-benefit or effectiveness), but also consideration of rights and social justice for equity-seeking groups and the

ability of the policy to support self-determination among the users (p. 126). They also suggest that the analysis incorporate the values of the community, and we identified community values related to collective wellbeing, diversity of scholarship, equity and fairness, community engagement, collegiality, and treating each other well. In exploring our values, we identified a tension between efficiency, which our current system emphasized, and incorporating values that were less easy to quantify or present succinctly without interpretation. We also recognized what hadn't been said in the consultation—that teaching and service were largely absent from the conversation.

Assessment of alternatives.

Once we understood the values of our community, we decided to look at alternatives to our current system. While faculties at SFU are self-governing collegial bodies empowered with determining who gets hired and how performance is evaluated, we expected to find that most academics would approach evaluation in the same way, with an emphasis on peer-reviewed research publications. While this was the case in many places, we were surprised to find substantial diversity in approaches. For example, when we looked at standards across SFU, we found that some faculties considered supervision of doctoral students and service to journals and granting bodies as research contributions.

We found another key alternative in the collective agreement at the time (SFUFA and SFU, 2014). While the merit system described previously was in place for academic faculty covered under the agreement, a different system was in place for librarians (who are also part of the agreement). The library equivalent of the merit review was structured differently—focusing on progress against mutually agreed upon goals—with the salary review earning a common step increase. That is, for librarians, there was no inequity built into the system, and this gave us hope that a similar system might be negotiated for teaching and research faculty.

When we looked more broadly, we found even greater diversity in approaches. The education faculties at the University of Calgary and Mount Royal, for example, contextualized their evaluation policy under Boyer's models of scholarship (1996), which considers the scholarship of discovery (basic research), but also the scholarship of integration (interdisciplinary education and research communication), the scholarship of application/engagement (research use); and the scholarship of teaching and learning (research on teaching and learning within the disciplines). We learned that consultations with Elders and communities in the service of research were seen as a research contribution at First Nations University. We found many different approaches to understanding diverse scholarship, including the idea of "creative professional activity" at OISE. At one institution, we found researchers being assessed according to their self-declared type of work so that one person might declare they engage in 50-50 research and teaching, whereas another might do 80-20 service and research.

We also engaged in the evaluation research, particularly as related to teaching but also including Boyer's model of scholarship (1996), a review of tenure policies across Canada (Gravestock & Greenleaf, 2008), and a review of quantitative measures of research quality, such as impact factors and citation counts (Abbott et al., 2010; Browman & Stergiou, 2008; Cameron, 2005; San Francisco Declaration on Research Assessment, 2012). In looking at teaching evaluation, we focused on the body of research that reviewed and critiqued the use of standardized student evaluations of teaching (Boring et al., 2016; Stark & Freishtat, 2014; Uttl et al., 2017; Wagner et al., 2016). At the time, SFU also had two overlapping working groups looking at teaching evaluations and we drew heavily from that work, both drafts and final copies (Student Evaluation of Teaching and Courses Working Group, 2017; Teaching Assessment Working Group, 2019).

Finally, in carrying out this work, it became apparent that while we were able to articulate our values and identify many of the important aspects of faculty work, there was minimal structured support for new faculty mentorship or career development for faculty moving from associate to full professor. The mentorship program in place at the time—an informal coffee or lunch between new faculty and a volunteer mentor, usually in an unrelated field—provided at best sporadic support that was deemed largely inadequate by many mentees. In looking at the research on mentorship and career development (e.g., Boice, 2000; Frieberg et al., 2021; Hsieh & Nguyen, 2020; Martin & Douglas, 2018; Pérez, 2019; Turner, 2015), we learned that mentoring is not just a one-on-one one-time experience; faculty mentorship is multi-dimensional and needed across the career span from graduate school, post-doctorate programs, to progressing through the professorial ranks. We also drew on the equity research happening in Canada (e.g., Henry et al., 2017) and elsewhere to consider how deserving equity groups encounter systemic barriers during their tenure and promotion process that need to be addressed in policy to practice at the faculty and institutional levels.

Across the US and Canada, there are intentional efforts to establish faculty mentoring programs institutionally (e.g., University of Columbia[3], UC Berkeley[4], University of British Columbia[5], University of Calgary[6]) and/or externally provided (e.g., National Centre for Faculty Development and Diversity www.ncfdd.com). We note that SFU became an institutional member of NCFDD shortly after we completed our work. Much of the research on faculty mentorship is in the fields of Nursing, Medicine, and other STEM disciplines, and we recognize that more research is needed within the social sciences and humanities.

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[3] https://provost.columbia.edu/sites/default/files/content/MentoringBestPractices.pdf
[4] https://vpf.berkeley.edu/faculty-mentoring
[5] https://academic.ubc.ca/faculty-life/professional-development/mentoring
[6] https://www.ucalgary.ca/provost/academic-leadership-academy/academic-leadership-mentorship-program

Feasibility assessment.

We presented the results of our consultation, review of tenure and promotion documents, and evaluation research to faculty in a public forum before engaging in any policy development. We highlighted the scholarship around research and teaching evaluation and how other faculties envisioned faculty evaluation (including the model used by SFU's librarians), as well as our learning regarding mentorship and career development. In part, we were interested in faculty response to the values we had identified and their tolerance for change in working to realize those values. We explored three options in our consultation with the community: keeping things the same, making incremental changes in line with our values, or engaging in more radical change. There was little support for keeping things the same; however, support for incremental change or radical change was much less clear and seemed likely to rest on the details of the changes we might bring forward. For example, there was both curiosity and trepidation expressed in response to a discussion of the library's model for biennial review.

Recommendations: Plundering Villages and Staffs of Fennel.

After our final consultation with faculty, the GRC members began the work of deciding what changes to make. We had identified three major problems to address: the breakdown in collegiality stemming from a competitive biennial salary review process; faculty discontent with the evaluation scope (that is, the breadth of work that was valued), and the use of standardized measures (i.e., comparative/rankable); and a lack of formal support for early career scholars working toward tenure and career development for faculty after achieving tenure.

The faculty at SFU are actively engaged in collegial governance; however, that governance happens within the context of a collective agreement. As a result, the changes we could make were constrained. The collective agreement required evaluation "on the basis of [faculty] performance

in three key areas of activity: teaching effectiveness; scholarly activity and service to the University, their academic discipline or the broader community" (p. 37). The agreement noted that "at a minimum, satisfactory performance in both teaching effectiveness and scholarly activity must be demonstrated" (p. 37). General requirements for teaching, research, and "non-traditional" scholarship were also defined in the agreement (SFUFA & SFU, 2014).

Standards for tenure, promotion, and salary review.

Because the collective agreement defined the parameters for tenure, promotion, and merit review and faculty had expressed a greater degree of confidence in tenure and promotion reviews, we approached changes in our standards document incrementally. To strengthen equity within our evaluation system, we recommended changes across two priorities: first, to better define and expand the indicators that faculty might draw from when undergoing review; and second, to empower faculty voice by ensuring each set of indicators included a statement allowing members to provide evidence of "Other activities identified by the candidate demonstrating [achievement in the specified domain]." We also added text noting that "The Committee and candidates should conceptualize presentation and evaluation of the dossier as a two-way conversation and seek out additional information or clarification as needed." By empowering faculty voice, we hoped to create the foundation for a more equitable dialogue between the candidates and the FTPC.

To address concerns about the ranking of applicants, we specified that standardized student evaluations and bibliometric data could only be used if provided by the candidate (SFU FOE, 2018). By making use of such data voluntary, we hoped to make it impossible for the FTPC to rank and value candidates based on their average course evaluation scores or through bibliometric data. Making provision of bibliometric data voluntary also made it more difficult to minimize faculty research contributions through the misuse of bibliometric data. We were also cognizant of

the limited role that service played in performance reviews. As a result, we spent considerable time expanding and redefining service indicators to help make much of the invisible work of faculty more visible and valued as active scholarship, and we made sure there was an emphasis on the value of service in its many configurations across the career framework, including promotion to full professor.

In doing this work, we recognized that we would undoubtedly confront yet another "faculty myth" that keeps this competitive comparative merit system in place, one that thrives on reward and punishment. We did not go into this process thinking, "how do we punish those who don't do the work that we value (the current problem) or who don't do any work at all?" – an argument that we constantly encountered. As a committee, we realized that we needed to rise above this pushback that included questions such as: How do we "incentivize" those who are "underperforming," "not publishing enough," or "have poor teaching evaluations" to improve?

In countering these questions, we simply looked at the numbers for reinforcement – in practice, only 1-2 faculty in a pool of 30-35 were ever given less than a 1 (on a scale of 0-2.0) in any given evaluation period. This fact alone reinforces our commitment that the betterment of the whole should not be defined by maintaining a punitive system to "catch" the very limited few.

Indeed, through the process of reviewing the TPC guidelines and merit process, we learned that there already exist many other structures in our review system beyond collegial evaluation that allows for performance interventions, and it is these that we conceptualize as the place for more substantive change efforts (e.g., teaching evaluation summary letters prepared by the director of programs; the dean's evaluation of files; etc.) to encourage the paucity few of our colleagues to meaningfully engage.

Changes to biennial salary review.

Biennial salary reviews presented us with a substantial challenge. Because of its ensconced place in the collective agreement, we could not approach changes incrementally. Instead, we decided to push for radical change within the broader university. We created a motion to faculty that would ask SFUFA to negotiate with SFU to allow faculties to award an average step to all members and, barring that, allow the Faculty of Education to develop their own approach as a pilot test (see Motion 3, Appendix 1). This strategy wasn't tinkering around the edges but pushing for change across the university.

Establishment of a mentoring program.

While we felt these changes fell within the scope of the work of our ad hoc committee, we were less sure of making recommendations related to mentoring and career development. While we uncovered a need in this area during our work, coming up with a solution was well beyond our capacity and mandate. Instead, we chose to ask the dean at the time to establish an Ad Hoc Committee on Faculty Development that would review the research on mentorship and career development and propose a formal faculty development program for faculty adoption (see Motion 4, Appendix 1).

Implementation.

Finally, we realized that the implementation of this work was far from certain. The incremental changes proposed to our tenure and promotions committee would require the support of the committee's chair and members to be realized. To support that change, we offered a motion that would require the committee to adjust its review processes to address the changes in policy (see Motion 2, Appendix 1).

Return to the City.

We returned to the faculty in the fall of 2018, bringing with us the motions for consideration and the revised criteria for tenure and promotion. We realized that substantial work was still needed to build consensus regarding these changes, so we provided the documents to faculty in advance, then formally presented the work to the Faculty for information and once more for discussion. Finally, an electronic ballot was held to allow faculty to vote on the motions anonymously.

The result was a clear mandate for change. More than 70% of eligible faculty voted on the motions, which was considered a very strong turnout for this type of balloting. The motions were all adopted, ranging from a low of 63% in favour of Motion 1 to a high of 77% in favour of Motion 4. The faculty had endorsed important, if incremental, changes to how we conceptualized teaching, research, and service and started the radical process of moving to a common step award that would break down the competitive structures in the evaluation system. The king was dead!

The King is Dead?

Having been adopted in late 2018, the changes would not take effect until the 2019/20 evaluation. While some rudimentary changes we made to the manner in which the FTPC gathered data, it is hard to say how much actually changed during deliberations, given the confidential nature of the FTPC's work.

That said, the potential to fully realize a change in our biennial salary review came to fruition with the adoption of our new collective agreement in the summer of 2020 (SFUFA & SFU, 2019). That agreement brought the step awards (now 0, 1, 1.5, 2, 2.5) into alignment with the steps made available to tenure committees (1.5 steps for each faculty member being reviewed). The mid-point in steps of 1.5 is now equal to the steps provided to the committee to award, making it

possible for all members to be awarded the same step. The first possible opportunity for the Faculty to Education to shift to this more equitable model was the 2020/21 evaluation period.

Enter COVID, Stage Right.

As we know now, a pandemic was growing in the spring of 2020 as candidates for tenure, promotion, and salary review were preparing their submission to the FTPC. Because of the substantial career interruptions brought about by COVID, the faculty association and university negotiated an agreement to suspend the biennial salary review for 2020/21 and 2021/2022 and instead award all members across the university with the mid-point salary step of 1.5, automatically implementing the change our ad hoc committee had asked for. That agreement is set to expire in 2022 (the entire collective agreement is set to expire in 2022), so the full adoption of our recommendation by a TPC is unlikely to be tested until the 2022/23 evaluation window— almost four years after adoption.

Ripples on the River Nile.

Much of the work was focused on addressing the inequities of our faculty evaluation system, and while it can be viewed, as we have done here, in isolation, it is, in fact, part of an ongoing effort to increase equity across the faculty. The call for a mentoring program has resulted in the development of a more intentional mentoring program to help support new hires in 2019/2020 and forward. This program, designed with our new colleagues' desires and needs in mind, has moved away from the informal lunch to regularly scheduled meetings designed as workshops and/or information sharing spaces. Anecdotally, we hear from our assistant professors that they value connecting with their new colleagues and having ongoing support. The evaluation of this program on the impact of their contract renewal, experiences of merit and/or tenure and promotion has yet to happen, so this may be another story that is told at a later date.

Faculty have also pushed the equity conversation into other corners of faculty governance, including the appointments committee, at the program levels regarding application review, and in efforts to understand who is admitted (and who is excluded) by the various admission procedures and policies in place. Further to this, the work of Indigeneity is advancing with the establishment of an Associate Dean, Indigeneity (Fall 2019), who works alongside our Indigenous Education Reconciliation Council and the Office of Indigenous Education. Our work, while important, represents just one front in the ongoing struggle to advance equity in our Faculty and across the university.

Interpreting Our Play: Conclusions and Implications

It might be useful to think of ourselves as living in the suburbs, where we have managed to create a chorus of sorts, within a larger institution that is still using competitive biennial review processes that privilege research and values only certain forms of scholarship. We have been repeatedly told by administrators and those thriving under the current merit system that a competitive step system is an important tool in identifying excellence within the faculties, particularly for larger awards (CRCs, University-level distinctions, National level awards), and that we would never be "allowed" to allocate the same step size to every faculty member. This may be the case—in which case, our fabulation will have to fuel new ways of working that ensure that the Faculty of Education is valued within the institution.

Within this suburb, though, we return to the importance of the choral, sororal links we made—working in a range of different research areas, with different motivations, we were able to move away from territorial conflicts that would have limited our ability to provoke change. This is a story of diversity, but also of space. As an ad-hoc group, with no fixed deadline, and a thoroughly non-hierarchical mode of collaboration, we could explore, learn and dream—free from

top-down imperatives and even normative assumptions. The freedom to reimagine has calendared beyond the length of a pandemic to new ways of being in a relationship. Time matters in committee work which has now also become research! How will our "service" here be valued?

Time matters also for implementation. Had the Bacchae not been evicted, and their rightful roles in the city been recognised (not just as daughters, wives, and mothers, but also hunters and chanters), it would have required constant vigilance to insist on these new roles. It would likely have taken a generation. Given the broader city in which we work, we anticipate a similar thing for the changes we've instaured, as they involved not just new rules and policies, but new ways of seeing research teaching and service as value-laden activities within a diverse community of engaged scholars, all equally worthy of merit.

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Appendix 1: Motions to faculty

Motion 1:

Motion to adopt the revised Criteria for Tenure and Promotion: Research and Teaching Faculty
The Faculty of Education ratifies the *Criteria for Tenure and Promotion: Research and Teaching Faculty* as presented to Faculty Council on 22/10/2018.

Motion 2:

Motion to align FTPC practices with the Criteria for Tenure and Promotion: Research and Teaching Faculty
The Faculty of Education requests the Faculty Tenure and Promotions Committee to review, revise, and expand as necessary the Faculty's common CV to help ensure faculty members provide the type of information the Committee needs to assess their contributions, with a particular emphasis on the type of information needed for biennial assessment; contract renewal; tenure and promotion; promotion to Professor / University Lecturer; and for review of Clinical / Professional Practitioner Faculty.

Motion 3:

Motion to revise the awarding of salary steps in our biennial evaluation
The members of the Faculty of Education ask that in the upcoming bargaining session (July 1, 2019–June 30, 2024), SFUFA and SFU negotiate a process to allow academic units the latitude to establish fixed salary step systems within the evaluation framework (akin to that in place librarians and archivists). If a university-wide approach to establish an egalitarian step system is deemed problematic by the parties, the Faculty of Education requests that the parties allow it to establish such a system on a trial basis, but not to exceed the term of the Agreement.

Motion 4:

Motion to develop a proposal for faculty development in the Faculty of Education
The Faculty of Education requests that the Dean establish an Ad Hoc Committee on Faculty Development. While we encourage the Dean and Committee members to take ownership of their mandate, we would ask the committee to:
- Review the research on faculty development, mentorship, and induction across the career spans of our ranks and positions. This review should be inclusive of the personal, professional, and career needs of all faculty members at each career stage (hiring, contract renewal, tenure and promotion to associate professor, promotion to full professor, retirement, for research stream faculty members; likewise for the similar stages of rank for teaching faculty, from Lecturer, to Senior Lecturer, to University Lecturer, and retirement; and for other contract faculty as appropriate),
- Review data on faculty recruitment and retention issues to inform our understanding of current costs to the institution,

- Review the costs, benefits, and resources available for establishing a faculty development program, in consideration of the broader efforts of faculty development occurring across the University
- Bring forth for faculty consideration and vote, a recommendation for establishment of a formal faculty development program.

Author Biography

Dr Dan Laitsch is and associate professor with the Faculty of Education at Simon Fraser University, and a Director on the SFU Faculty Association Executive. He is currently Chair of the Institute for Public Education, British Columbia (IPE/BC) and Past President of the Confederation of University Faculty Associations, British Columbia (CUFA-BC). A researcher with the SFU Centre for the Study of Educational Leadership and Policy, his primary teaching area is Educational Leadership. He co-edits the open access peer reviewed *International Journal of Education Policy and Leadership* (www.ijepl.org) and is active in the American Educational Research Association SIG on Research Use. Dr. Laitsch's research examines the use and misuse of research in policy and practice; the impact of neoliberal policies on educational systems; and the role of motivation within organizational and policy change efforts.

Dr. Michelle Pidgeon, (Mi'kmaq ancestry) is the inaugural Associate Dean, Indigeneity Ɂək̓ʷstənəq ts'up'newásentas and an associate professor in the Faculty of Education at Simon Fraser University. Dr. Pidgeon is passionate about higher education, student services, and Indigeneity. Theoretically and methodologically, her work is guided by an Indigenous wholistic framework with the intentional goals of: 1) transforming the educational system for Indigenous peoples and 2) empowering their cultural integrity. One of her ongoing projects is *Understanding Indigenous ethics and wholism within academic and Aboriginal community research* (SSHRC Insight Grant), which a comparative study exploring Indigenous scholars in the social sciences in Canadian and New Zealand universities navigation of their Indigenous ethics and research ethics boards.

Dr. Nathalie Sinclair is Distinguished University Professor in the Faculty of Education at Simon Fraser University, as well as Associate Dean, Research and International. Her research focuses on the role of aesthetics and the body in mathematics teaching and learning; she also leads the Tangible Mathematics Project, which has designed several digital technologies and teaching resources to support mathematics learning.

Dr. Lynn Fels is Professor, Arts Education, Simon Fraser University, and former Academic Editor of Educational Insights (www.educationalinsights.ca). Lynn's research engages performative inquiry, arts for social change, and performing mentorship. She is co-editor of Arresting Hope (2015) and Releasing Hope (2019), exploring women's experiences inside and beyond prison gates.