The following Motions and Documents were considered by the GFC Committee on the Learning Environment at its Wednesday, April 05, 2017 meeting:

Agenda Title: **White Paper: A Brief Analysis of Arguments For and Against Creation of Teaching-Only Stream**

CARRIED Motion: THAT the GFC Committee on the Learning Environment (CLE) approve the White Paper: A Brief Analysis of Arguments For and Against Creation of Teaching-Only Stream, as contained in Attachments 1 and 2.

Final Item: 4

FINAL Item No. 4

OUTLINE OF ISSUE
Action Item

Agenda Title: **White Paper: A Brief Analysis of Arguments For and Against Creation of Teaching-Only Stream**

Motion: THAT the GFC Committee on the Learning Environment (CLE) approve the White Paper: A Brief Analysis of Arguments For and Against Creation of Teaching-Only Stream, as contained in Attachments 1 and 2.

Item

Action Requested	☒Approval ☐Recommendation
Proposed by	Fahim Rahman, GFC CLE Subcommittee to Explore Teaching Tenure Stream at University of Alberta, and President of the Students' Union
Presenter	Fahim Rahman, GFC CLE Subcommittee to Explore Teaching Tenure Stream at University of Alberta, and President of the Students' Union

Details

Responsibility	Provost and Vice-President (Academic)
The Purpose of the Proposal is (please be specific)	To approve the White Paper: A Brief Analysis of Arguments For and Against Creation of Teaching-Only Stream.
The Impact of the Proposal is	N/A
Replaces/Revises (eg, policies, resolutions)	N/A
Timeline/Implementation Date	N/A
Estimated Cost and funding source	N/A
Next Steps (ie.: Communications Plan, Implementation plans)	Discussion (for feedback) at the GFC Academic Planning Committee (APC).
Supplementary Notes and context	N/A

Engagement and Routing (Include meeting dates)

Participation: (parties who have seen the proposal and in what capacity) <For further information see the link posted on the Governance Toolkit section Student Participation Protocol>	*Those who have been **informed**:* • Written update provided to GFC Committee on Learning Environment on October 5, 2016.
	*Those who have been **consulted**:* • Members of GFC Committee on Learning Environment on March 1 and January 25, 2017 and on November 2, 2016.
	*Those who are actively **participating**:* • Members of CLE • Members of CLE Sub-committee to Explore Teaching Tenure Stream at University of Alberta: Sarah Forgie (Chair of GFC CLE and Vice-Provost (Learning Initiatives)) Fahim Rahman (President of the Students' Union) Roger Graves (formerly Acting Director, Centre for Teaching and Learning) Firouz Khodayari (Vice President (Academic), Graduate

	Students' Association) Toni Samek (member of GFC CLE until June 30, 2016 and Professor and Chair at the School of Library and Information Studies) Rachel Milner (FSO Teaching Professor, Dept. of Biochemistry and member of AASUA until July 1, 2016) Sourayan Mookerjea (Assoc. Professor, Dept. of Sociology and member of AASUA since July 1, 2016)
Approval Route (Governance) (including meeting dates)	N/A
Final Approver	N/A

Alignment/Compliance

Alignment with Guiding Documents	**The Institutional Strategic Plan – *For the Public Good*** **Goal:** Build a diverse, inclusive community of exceptional students, faculty, and staff from Alberta, Canada, and the world. **Objective:** Create a faculty renewal program that builds on the strengths of existing faculty and ensures the sustainable development of the University of Alberta's talented, highly qualified, and diverse academy. iii. Strategy: Stabilize long-term investments in contract academic staff by offering career paths that include the possibility of continuing appointments based on demonstrated excellence in teaching.
Compliance with Legislation, Policy and/or Procedure Relevant to the Proposal (please quote legislation and include identifying section numbers)	**GFC Committee on the Learning Environment Terms of Reference (3. Mandate)** "The Committee on the Learning Environment is responsible for making recommendations concerning policy matters and action matters with respect to the following:□a) To review and monitor the implementation of the University's Academic Plan with regard to optimal teaching and an optimal learning environment. b) To review and, as necessary, recommend to the GFC Academic Planning Committee or the GFC Executive Committee policies on teaching, learning, teaching evaluation, and recognition for teaching that promote the University's Academic Plan. c) To review and, as necessary, recommend to the GFC Academic Planning Committee or the GFC Executive Committee policies developed by the Learning Services units to promote the University's Academic Plan. (GFC 22 SEP 2014) d) To develop policies that promote ongoing assessment of teaching, learning, and learning services through all Faculties and units.□e) To nurture the development of innovative and creative learning services and teaching practices. f) To encourage the sharing and discussion of evidence about effective teaching, learning, and learning services. g) To promote critical reflection on the impact of broad societal changes in teaching, learning, and the learning environment. h) To promote projects with relevant internal and external bodies that offer unique teaching and learning opportunities that would benefit the university community. i) To consider any matter deemed by the GFC Committee on the Learning Environment to be within the purview of its general

	responsibility. **GFC CLE Subcommittee to Explore Teaching Tenure Stream at University of Alberta Terms of Reference (2. Mandate)** The mandate of the subcommittee is to explore the opportunities and challenges for creating a teaching tenure stream at University of Alberta with the goal to enhance quality instruction and learning environment for undergraduate students. To fulfill this mandate the committee will consider undertaking the following activities: 1. Consider the ways creation of teaching tenure stream (accompanied by continuing appoint and job stability, greater professional development opportunities, increased scholarship of teaching and learning, increased support and resources from home department and faculty) will potentially affect the learning environment and quality of instruction available to undergraduate students at University of Alberta. 2. Review teaching tenure stream practices and arrangements at other Canadian peer institutions and research available literature on the issue in Canadian post-secondary landscape (and if need be, at equivalent American public post-secondary context).

1. Attachment 1: White Paper: A Brief Analysis of Arguments For and Against Creation of Teaching-Only Stream, Pg. 1-7
2. Attachment 2: A Comparative Analysis of Teaching Stream at Eight Canadian Post-Secondary Institutions.
3. Attachment 3: Terms of Reference of GFC CLE Subcommittee to Explore Teaching Tenure Stream at University of Alberta, as approved by CLE on March 2, 2016, Pg 1-6.

Prepared by: Fahim Rahman, President of the Students' Union, fahim.rahman@su.ualberta.ca

A Brief Analysis of Arguments For and Against Creation of Teaching-Only Stream

A Note on the Literature:

Prior to outlining the arguments for and against teaching tenure, it is prudent to note that the majority of this research originates in the United States, and therefore the structure and present state of their post-secondary education (PSE) system is inextricably bound up in many of the conclusions of the papers. While there are some similarities between the Canadian system and the American one, it is safe to say that the American system is more stratified and strained than the Canadian one. Therefore, particularly when looking at teaching outcomes, many of the apparent downsides of hiring teaching-only stream faculty may actually be attributable to systemic chronic-underfunding, rather than shortcomings of the individuals in these positions. For instance, one study mentions that teaching-only faculty are less likely to have office hours on campus, but then recounts a story about an instructor converting a utility closet to an office.[1] Canadian universities are – generally speaking – facing less severe challenges and the issues that appear to plague American contingent instructors would likely be rather foreign to their Canadian counterparts.

Additionally, there is lack of available longitudinal data on how student outcomes have changed before and after the establishment of teaching-stream. This makes conclusively proving that teaching-stream improves student outcomes challenging. However, there is a strong inductive argument that the introduction of tenure, with its benefits of job security and the potential for pedagogical research, will have a positive impact on student outcomes.

Arguments against Teaching Stream:

There are a number of issues that arise when looking at the workability of implementing a teaching stream. Some of which are valuable questions to ask, while other others seem to flow from a philosophical aversion to teaching-intensive positions. A major challenge is, of course, how to develop and implement a teaching-intensive tenure stream, and whether or not that stream should be fully integrated within the traditional tenure system, or rather if it should somehow operate in a separate, yet parallel space. A Council of Ontario Universities (COU) report argues that as long as teaching is valued, rightly or wrongly, less than research, integrating these teaching-intensive roles into the standard tenure system will only perpetuate the bias against those focused primarily on teaching.[2] While this concern appears somewhat valid, as this issue frequently comes up in interviews with teaching stream faculty, it is likely that

[1] Adrianna Kezar, "Examining Non-Tenure Track Faculty Perceptions of How Departmental Policies and Practices Shape Their Performance and Ability to Create Student Learning at Four-Year Institutions," *Research in Higher Education* 54, no. 5 (2013): 587.

[2] Leslie Sanders, *Teaching Stream Positions: Some Implications* (Toronto, 2011).

normalization of teaching-stream faculty, and the likely persistent salary differentiation should serve to partially ameliorate this problem.[3]

The COU also implies that, somehow, a focus on teaching may erode the "robust culture of inquiry in undergraduate education" that should be present on campus.[4] Of the many objections raised by those who oppose the introduction of teaching stream stream faculty, this one is perhaps the most problematic and persistent. Traditional discourses on the role and structure of the university tend to assume a high degree of complementarity between research and teaching, and on many levels, this relationship appears natural and rational.[5] However, the data on undergraduate education quality presents a more complicated picture. The majority of literature suggests that there is no relationship between quality of research and quality of teaching, and further that both teaching and research intensive faculty are adequately equipped to provide students with both a broad base of knowledge and specific insights into their field.[6]The evolution and rising importance of research productivity at universities has created an incentive structure such that for academics employed in 'traditional' roles, research tends to take precedence over teaching and pedagogical research. The introduction of a teaching stream should help mediate these competing interests, and create 'space' within a department for the furthering of teaching methods (including scholarship of teaching) without negatively impacting the research productivity of research-focused professors. Further, a more accurate predictor of student learning outcomes seems to be an individual's employment of certain teaching strategies – strategies that are not, by any means, accessible only to research-focused academics.[7]

There is also the issue of the overall research quality and prestige of an institution, as both are at potentially at risk if the professoriate becomes dominated by individuals not actively engaged in traditional research. While this concern may be valid, there is no real way of addressing it without getting into a larger discussion about the root cause of this issue, university funding. If an institution is being faced with stagnant or shrinking budgets, while also facing growing enrollment, there is no way out of that predicament that does not involve making painful choices. Further, it is unlikely that any major Canadian research institution (particularly U15) is intent on decimating the number of research-focused academics at their school, so the concern about the erosion of prestige seems to be more of a straw man than a substantive concern.

The majority of arguments offered against the creation of teaching stream position are offered by two specific subsets of the academic community. One group is the already privileged set of individuals who have the benefit of tenure and therefore need not be particularly concerned about

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[3] Susan Vajoczki et al., "Teaching-Stream Faculty in Ontario Universities The Higher Education Quality Council of Ontario" (2011): 36–37.

[4] Sanders, *Teaching Stream Positions: Some Implications*, 6.

[5] Ruth Neumann, "Perceptions of the Teaching-Research Nexus: A Framework for Analysis," *Higher Education* 23, no. 2 (1992): 159–171.

[6] J. Hattie and H. W. Marsh, "The Relationship Between Research and Teaching: A Meta-Analysis," *Review of Educational Research* 66, no. 4 (1996): 529–530.

[7] R. G. Baldwin and M. R. Wawrzynski, "Contingent Faculty as Teachers: What We Know; What We Need to Know," *American Behavioral Scientist* 55, no. 11 (2011): 1501.

their job security, or ability to earn a stable, fair income.[8] The other group are those who are presently employed in teaching-intensive roles but who would prefer to be employed in a more 'traditional', i.e. research-intensive position.[9] For them, they see the codification and formalization of teaching stream as detrimental, as these roles, viewed by some young academics as transitory, will increasingly become institutionalized and permanent. Both of these objections are problematic, as each group seems to presuppose that every individual within the academic community has, or ought to have, ambitions to carry out intensive research. Obviously, this is not the case, and there a number of instructors at other universities who have spoken to the fact that they prefer and also enjoy teaching. In some cases, the creation of secure, teaching-intensive positions has even drawn professors from other universities, eager to extricate themselves from the "publish-or-die" attitude of more traditional faculty appointments.[10] Even for individuals 'stuck' teaching, who would prefer to be employed in a position that involved a greater degree of research, the introduction of job security and retention incentives is most likely preferable to the tumultuous status-quo of being sessional or contract instructors.

There is some literature that suggests that part-time instructors may negatively impact student learning outcomes and retention.[11] This concern comes from speculation that part-time faculty are less likely than their full-time, tenured colleagues to understand the campus culture, be familiar with services to support student success and be less willing to engage with students outside the classroom. If this is the case, and that in and of itself is questionable, it strengthens the argument for the adoption of teaching-stream tenure positions, or other means of providing job security and a sense of belonging to contract faculty, as the provision of these benefits will likely increase their connection to the institution and their investment in better understanding the campus and associated services. A large body of research, which holds that job security and job performance are positively correlated, supports this conclusion.[12] A renewed incentive structure and reduced uncertainty makes these sort of productivity-enhancing investments worthwhile for the affected instructors. A study of the impact of instructor status on teaching quality at a large Canadian university found that "there is not a strong correlation between research-focused and teaching-focused college instructors – both have effective and noneffective teachers within each group…instructors do not make a large difference to student achievement".[13] These findings

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[8] For example, see: Sanders, *Teaching Stream Positions: Some Implications*.

[9] Lee Bessette, "The Teaching Track? Really?," *Inside Higher Ed*, 2012, https://www.insidehighered.com/blogs/college-ready-writing/teaching-track-really.

[10] James Bradshaw, "For a New Kind of Professor, Teaching Comes First," *The Globe and Mail*, 2013, http://www.theglobeandmail.com/news/national/education/new-breed-of-university-faculty-puts-focus-on-teaching-over-research/article14117866/; Moira Farr, "For Teaching-Only Faculty, a Controversial Role," *University Affairs*, 2008, http://www.universityaffairs.ca/features/feature-article/those-who-can-teach/.

[11] See: Timothy Schibik and Charles Harrington, "Caveat Emptor: Is There a Relationship between Part-Time Faculty Utilization and Student Learning Outcomes and Retention," *AIR Professional File* no. 91 (2004): 2–10.

[12] a. Yousef, "Satisfaction with Job Security as a Predictor of Organizational Commitment and Job Performance in a Multicultural Environment," *International Journal of Manpower* 19, no. 3 (1998): 184–194; Magnus Sverke, Johnny Hellgren, and Katharina Naswall, "No Security: A Meta-Analysis and Review of Job Insecurity and Its Consequences," *Journal of Occupational Health Psychology* 7, no. 3 (2002): 242–264.

[13] Florian Hoffmann and Philip Oreopoulos, "Professor Qualities and Student Achievement," *Review of Economics and Statistics* 91, no. February (2009): 92.

suggest that stated concern about teaching-intensive faculty eroding the quality of education is vastly overstated. In fact, there is some evidence that suggests teaching-intensive faculty can actually have a positive impact on the quality of education at the undergraduate level.

Arguments for Teaching Stream:

There are a number of strong practical, as well as philosophical arguments for the adoption of some form of teaching stream at the University of Alberta. Much of the recent scholarship on teaching quality has consistently found that there is either no difference in educational quality between tenured and contract instructors or, in some cases, that these non-tenured teachers actually improve student success and engagement. A study conducted at Northwestern University found a statistically significant increase in both students' grades and the likelihood of them taking another class in a field if they took a class taught by an instructor rather than a tenure-track professor.[14] While instructors at Northwestern do not have the benefit of formal teaching stream, Northwestern has pursued a policy of nurturing long-term, secure relationships with their instructors. These are individuals "with benefits, career ladders and job security"– something which could be considered roughly, albeit imperfectly, analogous to tenure.[15]

Another study that looked nationally at teaching methods in the United States found that full-time faculty, regardless of whether or not they were tenured, were more likely than their part-time counterparts to employ both learning (essays, presentations and peer assessment) and subject (multiple choice exams, short answer exams) centered approaches to teaching, while part-time faculty was heavily reliant on only subject-centered evaluations.[16] This finding led the researchers to conclude that the most effective allocation of a university's funds was to focus on ensuring that contingent instructors were offered full-time positions, as by virtue of being full-time, they were more likely to employ a broad, and constructive, array of evaluative methods.[17]It is worth noting here that there was no difference in the methods of research vs. teaching intensive faculty, suggesting that the nature of employment matters more than the individual's focus.

There is a notable lack of research into the impact of teaching only or contingent faculty on learning outcomes in Canada. The only econometrically sound study of instructor status and perceived educational quality was the aforementioned one which found no statistically-

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[14] David Figlio, Morton Schapiro, and Kevin Soter, *Are Tenure Track Professors Better Teachers?, NBER Working Paper Series* (Cambridge, MA, 2013), http://www.nber.org/papers/w19406.
[15] Ibid., 9.David Figlio, "Sunday Dialogue: Academia's Two Tracks," *The New York Times*, 2013, http://www.nytimes.com/2013/11/17/opinion/sunday/sunday-dialogue-academias-two-tracks.html?_r=0.
[16] Baldwin and Wawrzynski, "Contingent Faculty as Teachers: What We Know; What We Need to Know," 1494.
[17] Ibid., 1505.

significant relationship; however the authors did find that teaching-focused instructors received a nominally higher score when being assessed on perceived teaching effectiveness.[18]

Teaching Tenure – Policies and Protections

American Examples:

- The American Association of University Professors (AAUP) has an appendix in a major report on teaching stream initiatives which highlights the approaches that different US schools to instituting policies around this new category. Many of the schools listed are publically funded, and are therefore reasonable comparators. Most notably, the Pennsylvania State University system has instituted a formal teacher tenure track, while the University of California system has implemented a system wherein there is no formal tenure, but instructors are granted longer-term contracts and more equitable salaries and benefits.
- Appendix can be found here: http://www.aaup.org/report/tenure-and-teaching-intensive-appointments

Canadian Examples:

- University of Manitoba: According to a cursory review of the 2010-2013 Collective Bargaining Agreement it appears as though the university's teaching-intensive positions (Instructor/Lecturer designation) are afforded the same benefits as traditional faculty, including the ability to accrue research leave and longer-term contracts. Their salaries, however, are prorated.
- University of Toronto – Lecturer and Senior Lecturer, permanent appointments
- York: Alternate-Stream Appointment
- Waterloo: Continuing Lecturer
- Dalhousie, McMaster, UBC, SFU and the University of Regina all also have similar agreements in place with their instructors and contingent faculty.

Securing Institutional and Strategic Commitment

While the aforementioned schools appear to have created these new positions without excessive pushback from faculty, there have been some exceptions, where existing faculty associations have strongly pushed back against the creation of teaching stream stream positions – most notably at the University of Ottawa and University of Windsor.[19] While there is little information available on the specific issues that faculty at these institutions raised, it is reasonable to assume that they were similar to the general arguments against teaching tenure outlined above.

[18] Hoffmann and Oreopoulos, "Professor Qualities and Student Achievement," 88.
[19] Farr, "For Teaching-Only Faculty, a Controversial Role."

During discussions at the Committee on the Learning Environment, it was noted that attention should be paid to the name or title given to members in this potential category. For example, at the University of Toronto individuals recruited in both "teaching stream" and 'traditional stream' are called professors.. Both are referred to as assistant, associate or full professors depending on career stage. Alternatively, at UBC, the teaching stream is referred to as "educational leadership stream" and progression is made from an instructor position, to a senior instruction, and finally a full professor of teaching with tenure. Members of the Committee on the Learning Environment believed that the name/title used to refer to individuals in teaching stream may be significant in ensuring that these members are a valued part of campus, and are regarded similarly, if not equally, for their responsibilities and contribution as traditional professors.

If the University of Alberta were to move forward on this issue, it would be critical to more closely examine the processes that were used with success at York University, the University of Toronto and UBC. It would also be helpful to initiate conversations with the Students' Unions at these institutions to determine how, if at all, they were included in these discussions.

The *Delphi Project on Changing Faculty and Student Success*, located the University of Southern California, has developed a number of resources designed at facilitating discussions around the role and status of teaching-intensive faculty members.[20] This includes tracking the paths of successful attempts to address and change the role of these instructors on a number of campuses in the United States. There are, however, no similar studies of Canadian institutions that are readily available.

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[20] The Delphi Project on the Changing Faculty and Student Success, "Resources + Tool Kits," 2015, http://www.uscrossier.org/pullias/changing-faculty-student-success/resources-tool-kits/.

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Chart 1: A Comparative Analysis of Teaching Stream at Eight Canadian Post-Secondary Institutions

Information Heads	University of British Colombia[1]	University of Toronto[2]	McMaster University[3]	University of Calgary[4]
Ranks within teaching stream	• Called "Educational Leadership" • Instructor 1 • Senior Instructor • Professor of Teaching	• Called "Teaching Stream" • Assistant Professor • Associate Professor • Professor	• Called "Teaching Track" • Assistant Professor • Associate Professor • Professor	• Called "Instructor Stream" • Instructor • Senior Instructor (1 and 2, varies by unit and faculty) • Teaching Professor
Minimum requirements for eligibility	• "Normally requires completion of academic qualifications, evidence of ability and commitment to teaching" (p. 65) • "Judged principally on performance in teaching. Service to the academic profession, to the University, and to the community may be taken into account…but…it cannot compensate for deficiencies in teaching…" (p. 68)	• Required to show evidence as to the successful completion of a PhD program or other scholarly or creative professional work regarded by the division or department as equivalent.	• -	• Based on survey of job advertisements on the institutional career webpage, generally a PhD.
Roles and responsibilities of in teaching stream	• The criteria in this stream mirrors the traditional tenure stream; it is divided into teaching, and service, and may lead to an educational leadership position in the institution • "Teaching includes all presentation whether through lectures, Seminars and tutorials, individual and group discussion, supervision of	"While the patterns of these duties may vary from individual to individual, these duties, namely: Teaching and related Administrative Responsibilities; Scholarship, and Service, constitute the principal obligations of faculty members in the Teaching Stream." (p. 7)[5]	• Teaching will be the primary expectation of these positions; • Faculty are expected to keep abreast of developments in the discipline and are to consult colleagues with relevant specific research expertise. • No requirement to engage in research, those teachers who have an interest are encouraged to enhance their classroom teaching and broaden the	• Teaching • Pedagogical research • Curriculum Development and Educational Leadership • Service

[1] http://www.hr.ubc.ca/faculty-relations/files/CA-2012-2014_Online_November-29-2013.pdf
[2] https://www.utoronto.ca/news/u-t-introduces-new-teaching-stream-professorial-ranks
[3] http://www.mcmaster.ca/policy/faculty/Appointments/Tenure_and_Promotion_January%202012.pdf
[4] http://www.tucfa.com/wp-content/uploads/2016/09/CA_2016-2017.pdf
[5] http://www.provost.utoronto.ca/Assets/Provost+Digital+Assets/UofTWLPP_OCT2015.pdf

Information Heads	University of British Colombia[1]	University of Toronto[2]	McMaster University[3]	University of Calgary[4]
	individual students' work, or other means by which students… derive educational benefit" (p. 69) • "Scholarly activity may be evidenced by originality or innovation, demonstrable impact in a particular field or discipline, peer reviews, dissemination in the public domain, or substantial and sustained use by others. For example, textbooks and curriculum reform that changed academic understanding or made a significant contribution to the way in which a discipline or field is taught" (p. 70) • "Service performed for the benefit of Departments, Faculties, Continuing Studies, or other parts of the University (including the Faculty Association), and for professional organizations and the community at large" (p.70)		scope of their educational activity (curriculum development and evaluation, mentoring, and research into the efficacy of different pedagogical approaches) (p 5)[6]	
Distribution of workload and responsibilities	• The university recognizes "Academic units vary in their contributions to the University. As such, it is understood that what constitutes normal workload will vary from one unit to another" and they have a series of principles guiding workload: a) A reasonable and	• Workload fluctuates based on amount of service or administrative work – teaching releases are available when service responsibilities grow in service area. The overall workload should mirror tenure stream faculty • "Scholarship refers to any combination of discipline-based	• No specific distribution of teaching and other responsibilities was found. • The only policy governing workload is Guidelines for Load Teaching in the Spring / Summer Session, the Twilight Hour or Evening[8]	• No specific distribution of teaching and other responsibilities available (publicly). However, there is a Memorandum of Understanding between CUPE and the University, which provides a complex process of determining and assigning workloads.

[6] http://www.mcmaster.ca/policy/faculty/Appointments/Tenure_and_Promotion_January%202012.pdf
[8] http://www.mcmaster.ca/policy/faculty/Teaching/LoadTeaching.pdf

Information Heads	University of British Colombia[1]	University of Toronto[2]	McMaster University[3]	University of Calgary[4]
	equitable distribution of workload for faculty; b) A transparent process of workload allocation within a unit, which has decisions being made in accordance with criteria that are communicated to members within that unit; c) Flexibility in workload allocation that reflects the University's obligations and the unique missions of units, and is consistent with the type of appointment held by faculty members; d) A general approach to workload allocation that has been developed taking into consideration the operational requirements of the University and the unit and the input of members of the unit; e) Workload allocation that takes into consideration the comprehensive nature of the scope of activities and expectations appropriate to the faculty member's appointment, including approved participation in programs outside the unit (p. 16)	scholarship in relation to or relevant to the field in which the faculty member teaches, the scholarship of teaching and learning, and creative/professional activities. Teaching stream faculty are entitled to reasonable time for pedagogical/professional development in determining workload" (p.7)[7]		
Criteria for	• Performance review happens on	• Performance will be assessed on	• Assistant professor is evaluated	• "The applicant shall provide the

[7] http://www.provost.utoronto.ca/Assets/Provost+Digital+Assets/UofTWLPP_OCT2015.pdf

Information Heads	University of British Colombia[1]	University of Toronto[2]	McMaster University[3]	University of Calgary[4]
performance review and/or promotion	a set timeline o Instructor 1 ▪ 2 year appointments, 5 year considered for senior instructor o Senior Instructor ▪ Promoted in the 5th year or more to professor of Teaching • Criteria are "judged principally on performance in both teaching and in scholarly activity. Service to the academic profession, to the University, and to the community will be taken into account but, while service to the University and the community is important, it cannot compensate for deficiencies in teaching and in scholarly activity" (p. 68)	teaching effectiveness and pedagogical/professional development related to teaching duties, in accordance with approved divisional guidelines on the assessment of teaching. Administrative service will be considered, where such service is related to teaching duties or to curricular and professional development (p.21-22)[9]	at 6 years for tenure, Associate professor is evaluated at 4 and Professors are evaluated at 3 years. • The criteria include excellent teaching and satisfactory performance of University duties, and evidence of recognition external to the Department for the candidate's contributions. These contributions can take the form of curriculum development and/or evaluation (beyond the individual course), presentations and scholarship on teaching or pedagogy, mentoring, or research into the efficacy of different pedagogical approaches (p.26)[10]	names and contact information for at least three suggested referees internal (but external to the Department) or external to the University to comment on the applicant's teaching, scholarly work and pedagogical activities, as appropriate." • They also have a detailed internal review process for various stages in the process.
Pay scale Comparison for rank	• School of Business has exclusive agreement in collective agreement outlining the policy for salary increases for faculty members (p.53) • No general pay scales available publicly.	• Assistant/Associate Professor, Teaching Stream = $81,200 • Breakpoint = $140,600 -Academic Salary Administration, Academic Administrative Procedures Manual[11]	• No publicly available information	• Instructor $65,933 - $109,325 • Senior instructor 1: $79,325-$121,115 • Senior instructor 2: $121,116 max of $142,552 • Teaching Professor (2 pay-scale ranges provided) o $103,020 - $147,911 o $147,912 max of $267,852
Ability to participate in outside	• Yes, as long as it does not take up their time or pull them away from their work	• Activities Requiring Prior Approval: o All major paid professional	• Conflict of Commitment: Undertaking external activities (i.e. consulting, professional or	• They have to disclose major OPA (Other Professional Activities), and such

[9] http://www.governingcouncil.utoronto.ca/Assets/Governing+Council+Digital+Assets/Policies/PDF/ppoct302003.pdf
[10] https://www.mcmaster.ca/policy/Faculty/Appointments/Tenure_and_Promotion_January%202012.pdf
[11] http://www.aapm.utoronto.ca/academic-salary-administration#_Toc288214886

Information Heads	University of British Colombia[1]	University of Toronto[2]	McMaster University[3]	University of Calgary[4]
professional activity		activities: (a) Teaching for remuneration outside the University, other than occasional lectures, whether at another academic institution or for a professional development programme; or (b) A commitment to any individual project totalling more than 20 days in an academic year; or (c) Any combination of paid professional activities that is likely to exceed 45 days during an academic year (p. 4)[12]	other activities) which as a result of the time commitment, prevents the employee from fulfilling their obligations to the university or result in divided loyalty between the University and External Organization (p.3)[13]	engagements cannot have significant impact on their ability to work for the institution.
Total staff-count in teaching stream	• Professor of Teaching = 17 • Instructors = 164 (senior instructors not reported separately) • Based on information (from 2015) available on Institutional Planning and Research Office.	• U of T introduced teaching stream in 2015, therefore publicly available information on staff count in this stream is yet to be made available.	• No comprehensive totals available. • Faculty Maximum number of teaching stream appointments: o Business 6 o Engineering 8 o Humanities 9 o Science 15 o Social Sciences 13 (P.1)[14]	• Teaching Professor: 7 • Senior Instructor: 94.1 • Instructor: 166.7 • Based on information indicated in University of Calgary Data book (2015-16).

[12] http://www.governingcouncil.utoronto.ca/Assets/Governing+Council+Digital+Assets/Policies/PDF/ppjun221994.pdf
[13] http://www.mcmaster.ca/policy/Employee/Conflict_of_Interest_Policy.pdf
[14] http://www.mcmaster.ca/policy/faculty/Appointments/SPS_A9-Allocation-Teaching-StreamFaculty.pdf

Chart 2: A Comparative Analysis of Teaching Stream at Eight Canadian Post-Secondary Institutions

Information Heads	Waterloo University[15]	York University[16]	Dalhousie University[17]	University of Manitoba[18]
Ranks within teaching stream	• Called "lecturer" • Lecturers can be full-time ("continuing" or fractional-load basis ("definite-term") • "Lecturers" are distinct from "sessional instructors"[19] • However, a report by Faculty Association of University of Waterloo (FAUW) Lecturer Committee based on survey (response rate of 83%) indicated desire for change in nomenclature, preferably to some combination of ranks applied to "regular" professoriate and "teaching stream".	• Called the "Alternate Stream" (has exited for nearly 40 years). • Rank: Assistant lecturer, associate lecturer (with tenure), senior lecturer (with tenure). • The alternate stream also has three classifications: tenured, probationary and contractually limited (p.44).[20]	• Called "Instructor" • Instructor, Senior Instructor, University Teaching Fellow • Rank of 'University Teaching Fellow', "recommended only when solid evidence is established that the Member has attained and is likely to maintain a high level of effectiveness in teaching and other primary duties.	• Called "Instructor" • Instructor I, Instructor II, Senior Instructor
Minimum requirements for eligibility	• Nothing specifically indicates, but should have a PhD to be tenured lecturers. Additional criteria depending on faculty may apply.	• Min. Master's degree or equivalent background, "normally with teaching experience". Faculty units are allowed to develop their own additional criteria.	• Varies depending on position and individual faculty may have additional requirements	• Must have at least a Master's or equivalent • Varies depending on position and individual faculty requirements •
Roles and responsibilities of in teaching stream	• Teaching and service assigned in all three terms of an academic year. • "Assignment of duties must take into account the distinctive feature of	• Teaching and supervision • Service related to undergraduate education • Research related to teaching responsibilities (this will be considered under "teaching	• "Members with teaching responsibilities have an obligation to make all reasonable efforts to develop and maintain their scholarly competence and effectiveness	• General description of teaching provided for both traditional and teaching stream •

[15] https://uwaterloo.ca/secretariat-general-counsel/policies-procedures-guidelines/policy-76#twoa
[16] https://tanyacnoel.wordpress.com/2013/09/06/teaching-stream-faculty-positions/
[17] http://dfa.ns.ca/wp-content/uploads/2015/05/2014-17-collective-agreement-with-cover.pdf
[18] http://www.umfa.ca/member-resources/collective-agreement
[19] https://uwaterloo.ca/secretariat-general-counsel/policies-procedures-guidelines/policy-76#twoa
[20] http://www.yufa.ca/wp-content/uploads/2014/11/CA2012-2015.pdf

Information Heads	Waterloo University[15]	York University[16]	Dalhousie University[17]	University of Manitoba[18]
	university teaching (i.e., that instruction is provided by scholars who are expected to remain current in their field and maintain their scholarly competence) regardless of whether a separate rating for scholarship is part of the Lecturer's performance review." • One term in six-terms can be non-teaching term (section 2.a). • Non-teaching term activities generally involve new course/program development and increased service. Other activities could range from publishing (textbook revision, pedagogical research), participating in courses and workshops, and sabbatical (overseas travel or return to industry) (2015, p.3)[21].	performance" during performance evaluation). • Sabbatical leave of one year for every six years of service (similar to the professorial stream).	as teachers within the area of expertise in which they are employed, to prepare, organize, and present their subject matter so as to facilitate comprehension by their students, and to revise that subject matter when appropriate." •	
Distribution of workload and responsibilities	• A recent survey report conducted by the FAUW Lecturer Committee indicated: "The ratio of the components defining lecturer positions (teaching / research / service) varies greatly. While the most common appointment was 80% teaching / 20% service, a substantial proportion of lecturers (28%) have large service components (50–70%). These service tasks included administrative	• 70% teaching and remaining spent on research (usually pedagogical) and service (self-reported, see here). • The current collective bargaining agreement provides a rather lengthy discussion on teaching load, which is based on multiple criteria with complex arrangements based on average teaching loads in different academic unit (including at the faculty	• Includes primarily teaching and professional/pedagogical development.	No specific information pertaining to this stream could be found

[21] https://uwaterloo.ca/faculty-association/sites/ca.faculty-association/files/uploads/files/fauw_2015_lecturers_survey_report.pdf

Information Heads	Waterloo University[15]	York University[16]	Dalhousie University[17]	University of Manitoba[18]
	appointments such as associate dean, associate chair and program director" (2015, p.1)[22]. • 17% of individuals who responded in this survey (83% response rate) and had research component in their role, had workload distribution of 60% teaching, 20% research and 20% service. The report also indicated "Several respondents indicated that research was discouraged in their unit (three respondents) and/or not recognized and rewarded (two respondents)" (2015, p.2). • 80% generally translates into 6 courses per calendar year. 15% of survey respondents indicated teaching more, where as another 15% indicates teaching "three or fewer". 84% of survey respondents were involved in delivering core or required courses, but some also taught online and graduate courses. • [*There are however, challenges with quantifying course load and the above figures underestimate actual teaching contributions. For*	level). However, it does not distinguish between alternate and professorial stream.		

[22] https://uwaterloo.ca/faculty-association/sites/ca.faculty-association/files/uploads/files/fauw_2015_lecturers_survey_report.pdf

Information Heads	Waterloo University[15]	York University[16]	Dalhousie University[17]	University of Manitoba[18]
	example, they do not account for coordinating large lecture courses, coordinating multiple TAs for multi-section courses, supervision of practicum or placement courses etc. See p.2 for more on this].			
Criteria for performance review and/or promotion	• Criteria for evaluating teaching for lecturers are no different than that for regular professoriate. However, definite-term lecturers may be promoted to continuing after having served for at least three years. • "For those holding definite-term appointments, a recommendation to reappoint at a higher rank shall be considered by the Faculty Tenure and Promotion Committee (FTPC), and requires the approval of the Dean and the VPA&P" (section 2A). • In contrast, "Faculty members with Continuing Lecturer appointments are not eligible for tenure or promotion consideration or for sabbatical leave. These positions are understood to be unusual and offered only in special circumstances" (Section 3D).	• "The only common element in the streams [professorial and alternate] is the procedure of evaluation for tenure and promotion" (p.2) • Tenure and promotion based on performance (including student evaluation of teaching) and peer review. • "Extensive preparation and a large number of contact hours per week in the classroom, laboratory or studio are required of individuals in this stream" (pg. 2)[23].	• "Consideration for promotion shall be by a committee within the Member's Department, School, Library or similar unit, elected by the members of that unit, and by the Chairperson, Head or Director, and professional librarian Members by the Chief Librarian." • "Solid evidence of teaching effectiveness and contribution shall demonstrate a professional commitment to progress as a university teacher and to leadership in university teaching. It may include evidence of mentorship of teaching colleagues, development of new courses, development of innovative teaching aids and techniques and scholarly activity related to pedagogy. It may also include other kinds of scholarly activity if **scholarly activity is a requirement of the position set out in the instructor Member's letter of appointment or job**	• "Factors that may be considered include: course work and all related activities; supervision of the work of honours and graduate students; participation in seminars and colloquia; innovative methods in teaching and other contributions to the teaching activities of the University. The written opinions of students and/or fellow faculty members shall normally be sought."

[23] http://docplayer.net/21860613-Tenure-and-promotions-alternate-stream-document.html

Information Heads	Waterloo University[15]	York University[16]	Dalhousie University[17]	University of Manitoba[18]
			description" (emphasis added) • "Assessment of instructor Members shall focus on the effectiveness and general competence with which teaching and other assigned duties and responsibilities are carried out. In assessing teaching effectiveness, opinions of students (subject to Clause 18.09), other Members, and other teaching staff shall all be taken into account, insofar as is appropriate, and each class of opinion shall be given due and fair consideration and no 26 class of opinion shall be given undue or unfair consideration or weight. Wherever possible, such opinions shall be based on firsthand knowledge of the instructor Member's performance in the classroom, laboratory or field."	
Pay scale Comparison for rank	• Lecturer (as of May, 2014) o Floor = $57,784 o Threshold 1 = $111,329 o Threshold 2 = $129,564 • Clinical lecturers have roughly $20,000 higher pay at each of the above three levels (see section 13.2.1)[24]	• Minimum Salary floors o Lecturer= $48,000 o Assistant Lecturer = $49,000 o Assoc. Lecturer = $58,000 o Senior Lecturer = $72,000 [These floors have remained the same since 2006 according to the agreement].	• Instructor Floor $58,388-$87,896 Celling • Senior Instructor Floor $73,134-$112,478 Celling • University Teaching Fellow Floor $87,880- $119,847 Celling	• Instructor I Floor $58,523-$87,784 Celling • Instructor II Floor $67,382-101,074 Celling • Senior Instructor Floor $73,338-$110,006 Celling[26]

[24] https://uwaterloo.ca/secretariat-general-counsel/documents-potential-interest/memorandum-agreement-uw-fauw#facultysalaries
[26] http://www.umfa.ca/images/pdfs/member-resources/ARTICLE-24.pdf

Information Heads	Waterloo University[15]	York University[16]	Dalhousie University[17]	University of Manitoba[18]
		Effective May 1, 2015, this base salary will be increased by 1.5% in each of 2015, 2016 and 1.0% in 2017 (pg. 23)[25].		
Ability to participate in outside professional activity	No available information specific to this stream.	No available information specific to this stream.	Yes, though they must report Outside Professional Activity (OPA) and ensure it does not impact their work at Dalhousie.	Yes, must report Outside Professional activity if 'substantial unpaid' or paid activity.
Total staff-count in teaching stream	There are 183 lecturers according to the Report of the 2015 Lecturers Survey .	There are 56 such lecturers (tenured/probationary) based on information indicated in York University Fact book (as of October 2015).	No publicly available information.	165 Instructors based on information indicated in University of Manitoba Data book (2015-16)

[25] http://www.yufa.ca/bargaining/

GFC Committee on the Learning Environment (CLE)

Subcommittee on the Exploring Teaching Tenure Stream at University of Alberta (TTS)

DRAFT TERMS OF REFERENCE

Background

See Attachment 2: Exploring Teaching Tenure Stream at University of Alberta.

Committee Mandate

The mandate of the subcommittee is to review current literature and solicit feedback from those who would be impacted by a teaching tenure stream to address the following question:

How will the learning environment and quality of instruction be impacted by a teaching tenure stream at our campuses, bearing in the mind perceived benefits and consequences of this change to our University's ability to provide a high quality learning experience for students?

The committee will not recommend how a teaching tenure stream be worded into the Collective Agreement, but will determine what components are required for a teaching tenure stream that best addresses the needs for a high quality learning environment at the University of Alberta.

Committee Composition

- One representative of the Graduate Students' Association
- One representative of the Students' Union
- One representative of the Provost's office
- One representative of Department Chairs
- One representative of Academic Staff
- One representative of the Center for Teaching and Learning
- One representative of the Association of Academic Staff University of Alberta (external to CLE)

Committee Meetings and Timeline

- The subcommittee will meet between March 2016 and October 2016.
- A preliminary report for discussion will be presented at the September 2016 CLE meeting.
- A final report will be submitted at the October 2016 CLE meeting, and if approved go to the November 2016 GFC meeting.

Committee Support

University Governance will provide administrative support.

Reference and Resource Documents:

GFC Policy Manual section on Teaching and Learning
http://www.gfcpolicymanual.ualberta.ca/en/111TeachingandLearningandTeach.aspx

Attachment 2: Exploring Teaching Tenure Stream at University of Alberta (distributed to CLE on November 24, 2015)