

Post-Tenure Effort Allocation

Post-tenure Allocation of Effort

The University's Policy on Post-tenure Allocation of Effort is available from the Provost's Office or on-line at <http://opsmanual.uiowa.edu/human-resources/faculty/post-tenure-effort-allocation>.

The "Portfolio" Principle

Under the University's Policy on Post-tenure Effort Allocation, faculty members and their DEOs may negotiate individualized agreements (or "portfolios") in which the proportion of time or effort devoted to each of the three areas of the department's mission (teaching, research, and service) differ from the department's norms for a period of time. Annual salary increases will reflect merit in the performance of activities specified in the portfolio.

Unit Norms as the Basis of Individualized Portfolios

Each department has specified (in a simple percentage-of-effort formula) its expectations for a typical full-time faculty member's "portfolio" of instructional activity, scholarly or creative activity, and service to the institution. The Dean and the Provost must approve any changes to these norms.

The department has also developed a statement of what activities this typical portfolio comprises. These statements reflect disciplinary norms and reinforce the expectation that both a strong, up-to-date curriculum and national visibility in scholarly and/or creative work are the joint responsibility of the entire departmental faculty. The statement will be the basis of any individualized portfolio agreements negotiated within the department, which must specify in writing the activities the faculty member will undertake during the term of the agreement.

The DEO's Responsibility for Managing the Allocation of Faculty Effort

Either the faculty member or the DEO may initiate the discussion of an individualized portfolio, with the understanding that faculty are not automatically entitled to portfolios and that any portfolio negotiated must be in the best interest of both the department and the faculty member. The arrangement may not compromise the department's ability to fulfill its teaching, research, and service obligations. The faculty member may not reduce his or her teaching or

scholarly/creative contribution to 0% for any period of time. The portfolio must not compromise a tenured faculty member's progress toward promotion.

The DEO submits all portfolio agreements to the Dean, who must approve them before they can be implemented in the next academic year. The DEO must also distribute to the faculty a description of each portfolio agreement and an explanation of how the department will continue to fulfill its mission while the agreements are in force.