

HELEN MICHAELS: THE DECISION

Michelle Maher
University of South Carolina

Tim Burson
Queens University of Charlotte

Tenure decisions in academia are critical, due to the all-or-nothing nature of the tenure system. A faculty member who is granted tenure by a university has maximum job security at that institution; one who is denied tenure is basically dismissed from that position, given one additional year of employment (the so-called terminal year) to search for employment elsewhere.

This important situation becomes more complex when the decision is not clear-cut. This was the case with the tenure decision involving Helen Michaels, assistant professor of accounting at Atlantic Southern University. Michaels was generally liked and respected by colleagues and students, and was known as a hard worker, someone who would step up and take on unpleasant tasks for the overall betterment of the business school. However, Michaels also had some uneven teaching evaluations, and had not produced research in the quality or quantity of most of her colleagues. Michaels' departmental review committee (DRC) had already voted to deny tenure, and a similar recommendation by the dean of the business school would end Michaels' quest for tenure. The dean's decision comes down to this: should the school grant tenure to a faculty member who is "pretty good," or dismiss the individual and search for someone better, no guarantee in a discipline such as accounting, where applicants are in shorter supply due to attractive options outside of academia.

INTRODUCTION

Brad Dobson scanned quickly to the bottom of the report, read the last paragraph and thought, "they're not making this easy for me." Dobson, the dean of the Stockridge School of Business at Atlantic Southern University in South Carolina, was viewing a report submitted by the Departmental Review Committee (DRC) of Dr. Helen Michaels, assistant professor of accounting. The committee, consisting

of Stockridge faculty members Ben Charles, Jim Hinson and Andrea Collins, had made a negative recommendation regarding tenure and promotion for Michaels, citing her “uneven” teaching evaluations and expressing concerns regarding Michaels’ long-term commitment to research.

Dobson was aware that Michaels had encountered some problems in the classroom, but also knew that Michaels was a hard worker who was generally liked and respected by colleagues as well as students. Tenure decisions at Atlantic Southern were frequently clear-cut, but this was destined to be more complicated. One additional issue that troubled Dobson was the concern that the DRC may have had an agenda, trying to oust Michaels to create a faculty position for the spouse of one of the committee members.

The next step in the process was for Dobson to make a recommendation; if he agreed with the DRC, Michaels’ candidacy for tenure would end, she would be offered a “terminal” contract for the 2009-10 academic year and the college would have to quickly replace its only terminally qualified accounting faculty member. If the dean were to disagree with the DRC, the mixed recommendations would then progress to the Faculty Personnel Committee, whose decision would likely determine Michaels’ fate. Dobson’s disagreement with the DRC could also cause any number of internal problems within the business school, as the DRC would likely be unhappy with the dean’s lack of confidence in them, and faculty and staff would inevitably be asked to choose sides. Dobson eyed the thick tenure file, aware that this was a critical decision which would have to be made carefully.

BACKGROUND

Atlantic Southern University was founded in 1897 as a church-affiliated liberal arts college; the undergraduate business major was started in 1948, an evening MBA program began in 1980, and an executive MBA program was added in 1990. The business school was named for local military hero Mark Stockridge in March 1993, as a result of a gift from one of Stockridge’s family members. The Stockridge School had always emphasized excellence in teaching; faculty research activity was applauded, but received minimal financial support and had little impact on tenure and promotion decisions.

The Stockridge name brought some positive recognition, which was leveraged into additional resources and faculty. By 2001, the internal view was that the Stockridge School could develop into a premier regional business school, but needed to raise its profile. Atlantic Southern and the Stockridge School were highly regarded in the area, but that favorable reputation did not reach too far out of the South Carolina midlands region. It was felt that one way to bring excitement and recognition to

the Stockridge School would be to gain accreditation from the Association to Advance Collegiate Schools of Business (AACSB). The business programs were already accredited regionally by the Southern Association of Colleges and Schools (SACS) and nationally by the American Collegiate Business Schools and Programs (ACBSP). However, the Stockridge School's primary regional competitors, Emory and USC-Columbia, did have the more prestigious AACSB accreditation, and it was known anecdotally that at least one of these schools was using this in student recruiting, stating simply (and incorrectly) that the Stockridge School "was not accredited." AACSB candidacy, a five year process, was started in 2002. One of the major challenges that would face the Stockridge School in this accreditation effort was that the faculty would have to collectively demonstrate a commitment to scholarly research and other types of intellectual contributions. As mentioned earlier, the emphasis at Atlantic Southern was on teaching; several faculty members would have to build their research portfolios from scratch.

HELEN MICHAELS

Helen Michaels received her undergraduate accounting degree from State University in 1980, and was a practicing accountant in the private sector for nine years before returning to State's graduate school, receiving a PhD in Accounting in 1992. Michaels' first academic job was a tenure-track position with a large, state-supported university in the Columbia area. This business school placed an emphasis on research, and was trying to build its reputation as a regional research center. Michaels came up for tenure during the 1998-99 academic year, and was denied tenure largely due to insufficient quality and quantity of research. Michaels had solid teaching evaluations and a handful of publications and other research presentations, but the tenure committee was looking for more publications in higher-tiered journals. The job opening at Atlantic Southern arose while Michaels was working her terminal year, she accepted the offer from the Stockridge School and began there in the 1999-2000 academic year. Michaels was delighted to move to Atlantic Southern College, as she could stay in her existing residence and not have to relocate her family. In addition to her "on-load" classes, Michaels was also offered several sessions in the Stockridge School's Executive MBA program; the additional pay from these sessions allowed the school to offer Michaels a more competitive compensation package. This is always an issue when faculty move from a state-supported institution to a private school, particularly so in accounting. Accountants with a masters or certified public accounting (CPA) degree frequently go into private practice rather than attempt to earn a doctorate. This meant there would be fewer terminally qualified accountants, and the shortage in supply would drive up salaries for those positions.

Upon arriving at Atlantic Southern, Michaels quickly established a reputation as a pleasant colleague who was willing to pitch in and help wherever possible. Marketing professor Rob Bradley recalls that, “Helen was always someone who could be counted on if we needed prospective students contacted, a representative at an open house, or even a presence on an ad-hoc committee.” Students discovered that Michaels was readily available to provide assistance, either individually or in group sessions.

The following two examples illustrate Michaels’ willingness to be a “team player.” In 2004, the Stockridge School lost a part-time accounting instructor, and was struggling to fill the position. The business school offered day classes populated largely by traditional-age students, and an evening program geared toward working adults. The school did not have enough full-time faculty to staff all of the business classes, and used adjunct instructors to supplement the regular faculty. The adjuncts were typically working practitioners, who were available to teach only in the evening program.

One resume stood out among the applicants for the accounting position, a well-qualified instructor who had recently relocated to the area. However, she was also the primary caregiver for her elderly father, and was only available to teach at certain times during the day. In order to accommodate the applicant’s scheduling constraints, Helen Michaels volunteered to change her schedule, and teach three evening classes per semester. Rob Bradley noted that, “this was really a big sacrifice by Helen. We (full-time faculty) all know that we are required to teach some at night but three every semester...that’s a lot of time spent away from family.” The new hire worked out well, and Michaels continued to teach three evenings every semester.

Michaels also stepped up when the Stockridge School needed to make changes in the undergraduate business programs. Prior to seeking AACSB accreditation, the business school was known as the “Stockridge Graduate School of Business,” as only the graduate programs were under the direct control of Stockridge personnel. The undergraduate business programs, due to a rather arcane power structure, were operated by the College of Arts and Sciences, the liberal arts arm of the college. However, AACSB considered all business degree programs to be part of the business school, so the Stockridge School would gain “ownership” of the undergraduate business programs. Stockridge dean Paul Black decided that a faculty member needed to become director of the undergraduate programs; duties

would include curriculum review, program coordination and enhancement of “assurance of learning” standards on the undergraduate side. The faculty was rather skeptical about this position; economics professor Phil Callison voiced their concerns, suggesting that the position would entail, “a lot of work and responsibility, no money and little recognition.” Dean Black asked Michaels to take on the undergraduate position; Michaels expressed concern that the undergraduate responsibilities would take time away from her research pursuits, but agreed to accept the position. Associate dean Mark Stevens worked closely with Michaels in preparing the undergraduate programs for AACSB review, and said, “Helen did a good job with the undergraduate program. She was always very thorough, and never missed a deadline.”

It also appeared that research would be less of a problem for Michaels, as she had some publications and presentations that would carryover from her previous job. AACSB required that a certain percentage of full-time faculty achieve “academically qualified” status, which is based on research efforts over the five previous years. The Stockridge School set a standard of two peer-reviewed journal publications and three “other” activities (which included a wide range of intellectual pursuits) over the five-year period. An internal review was done early in the process, and Michaels was one of the few faculty thought to be academically qualified at the time. As the process continued, the Stockridge School brought in a retired dean to serve as a consultant; he discovered that both of Michaels’ publications were in the same journal, which was not peer-reviewed. This meant that Michaels would need two additional publications in peer-reviewed journals to become academically qualified.

As time passed most of the faculty made solid progress toward their research goals, while Michaels did not. This was puzzling to faculty colleagues, as one noted, “Helen always seemed busy, but really didn’t get much accomplished, particularly research.” After the Stockridge School received AACSB accreditation in 2007, economics professor Phil Callison decided to write a “how-to” paper on the accreditation process, but needed help on the portion of the paper that dealt with the school’s improvement on outcomes assessment. Michaels had worked closely on assessment, so Callison asked Michaels to be his co-author on the project; Michaels politely declined, saying she wouldn’t have time since she was working on another research project. Callison was surprised, recalling that, “...it was an easy paper to write, as I just reported events that already occurred. Helen could have done her part in a couple of days, and it wouldn’t have interfered with her other project.” Callison later completed and presented the paper as the sole author.

BRAD DOBSON

Brad Dobson spent the bulk of his career in the private sector, building an impressive resume in the financial services industry. His introduction to the Stockridge School came as a guest speaker in a finance class, and he was named an executive-in-residence in 2001. He enjoyed the college atmosphere, and accepted a position on Atlantic Southern College's Board of Trustees in 2002. Dobson retired from his full-time position in 2004, but maintained his relationship with the college. When Paul Black, dean of the Stockridge School, announced his retirement a few months later, Dobson was offered that position, in hopes that he would lead the business school through the remainder of its AACSB candidacy. Dobson decided to postpone his retirement, and became interim dean for the 2005-06 academic year; the interim position was removed after the first year. It took some time for Dobson to become familiar with the "academic" way of doing things, and early on he frequently sought counsel from senior faculty members like Jim Hinson and Andrea Collins.

Dobson focused on AACSB and the publications needed to gain "academically qualified" standards in his initial meetings with the faculty. However, he also met with a variety of students, and consistently heard how much the students appreciated and valued the relationships they had forged with their professors. Dobson decided to visit a class of each faculty member, and gained a much greater appreciation for the faculty during those visits, explaining that, "I was able to see them in their element, and realized that we had a group of highly-skilled teachers who really cared about their students." These experiences were also helpful for Dobson when he began to hear concerns regarding Helen Michaels' performance in the classroom.

BEN CHARLES

Ben Charles came to Atlantic Southern College in 2005, and was considered an important hire for the Stockridge School in the AACSB initiative. Charles had been working at one of South Carolina's large public universities, but disagreed with that school's administrative direction and decided to look elsewhere. He was dynamic in the classroom, regularly published in top journals, and quickly connected with some of the leaders in the local business community.

Charles was not originally a part of Helen Michaels' Departmental Review Committee (DRC), but was asked to participate when one of the three members left Atlantic Southern to work at another college. Typically, only tenured faculty

members are asked to serve on DRC's, but Charles was included when it became apparent that Michaels was having some struggles in the classroom. Associate dean Mark Stevens made this appointment, thinking that, "Ben was so good in the classroom, I hoping he could be something of a mentor to Helen." That strategy was somewhat unsuccessful, as Charles spent much of his working time away from campus. His family did not relocate to the Atlantic Southern area, as his son was in high school and his wife was a business professor at Charles' previous place of employment. Charles rented a condo near Atlantic Southern College, and arranged his classes so he could stay there one or two nights a week, and work at the primary family residence the remainder of the time. The Stockridge School administration had agreed to this arrangement when Charles was hired, and he did a fine job with his teaching and research, but was typically unavailable when it came to something like mentoring Michaels.

One further situation had developed in the previous few months involving Ben's wife, Sally Charles, and her employment status. Sally Charles had not completely decided to seek a new job, but she was quietly investigating some options, including the Stockridge School. Their son would be graduating high school and moving away to college, lessening the ties to their current residence. Sally taught accounting and finance and, like her husband, had a very impressive curriculum vita which included teaching awards and several journal publications. On a visit, she and her husband had an informal lunch with Brad Dobson and Jim Hinson, presumably so the involved parties could get to know one another better. Nothing concrete developed from this meeting, and the Stockridge School did not have any positions open in either accounting or finance, but Helen Michaels did confide in two colleagues that this development had her concerned.

JIM HINSON AND ANDREA COLLINS

Jim Hinson and Andrea Collins were senior members of the Stockridge faculty, and both had previously held important administrative positions at Atlantic Southern, with Hinson serving as business division chair for several years (before the business school had a dean) and Collins serving as interim provost for a four-year stretch. Though neither had served in these capacities in recent years, they still held considerable influence within the Stockridge School. Collins had been married when she came to Atlantic Southern; that marriage failed, but she and Hinson wed sometime after her divorce. The two were extremely compatible, as illustrated by economics professor Phil Callison's recollection that, "in my entire time here at Atlantic Southern, I can't ever remember Jim and Andrea being on opposite sides of an issue, regardless of whether it was large or small." Hinson and Collins were

particularly protective of the Stockridge School's MBA programs, as they were there in the early days of those programs, when they were delivered by a rather mediocre collection of regular faculty and adjuncts.

Helen Michaels did not teach graduate classes before coming to the Stockridge School, and had some adjustment problems in those higher-level classes as indicated by student evaluations. Michaels worked hard to address these issues, and her evaluation numbers improved, though her scores were still below overall faculty averages. Despite her improvements, Hinson and Collins felt that Michaels still did not meet the standard of performance they wanted to see in Stockridge's MBA classes.

THE DECISION

Brad Dobson scanned the final pages of Helen Michaels' thick tenure file. The file included many letters of support from Stockridge faculty, staff and students, letters that suggested a variety of reasons why Michaels should be granted tenure. There was a somewhat skimpy research resume, though Dobson noted that Michaels did have two papers under review; if both were accepted for publication, Michaels would satisfy the criteria for academically qualified status. Finally, there was a stack of teaching evaluations, where students lauded Michaels attitude and willingness to help outside class, but also suggested that Michaels had limitations as a teacher. Dobson knew that tenure was an all-or-nothing decision; if granted tenure, Michaels would likely spend many more years in the Stockridge School, but if the decision went against Michaels, a search for her replacement would have to begin immediately. There would be no guarantee that such a search would uncover better candidates, certainly not for Michaels' salary line, as she was willing to come to Atlantic Southern for less money since her family didn't have to relocate. Dobson moved to his computer and began drafting his recommendation.