Final Report
To Tenure and Beyond: Building an Intentional Career in STEM
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Program Description

Pay It Forward funding was provided to support a regional career development workshop for pre-tenure women professors in STEM in Northern Ohio with the objectives of developing strategic skills, building confidence and fostering the development of a strategic career plan.

Drawing from the partner universities involved in the NSF-PAID grant IDEAL (Case Western Reserve University (CWRU), Bowling Green State University (BGSU), Cleveland State University (CSU), Kent State University (KSU), the University of Akron (UA), and the University of Toledo (UT). The NSF project IDEAL has three major objectives: 1) create a regional learning community, 2) leadership development for senior faculty, and 3) institutional commitment to the advancement and participation of women faculty at the partner universities. IDEAL objectives are accomplished through leadership development workshops, an annual plenary conference and the design and launching of an annual change project by Change Leader Teams at each university.

The IDEAL change projects progress a university-specific institutional theme around the participation and advancement of women faculty including aspects of the creation of mentoring and faculty development programs for their universities. To Tenure and Beyond (TT&B) was conceived as a mechanism to formally launch efforts aimed at pre-tenure faculty and provide momentum for the further establishment of mentoring and faculty development activities at the universities. The workshop complemented the transformative activities of the IDEAL partner schools engaged to increase the participation of women in academia.

Overview of Proposed Activities
The activities and format proposed were based upon focus group data from CWRU women faculty and climate survey data from several of the IDEAL institutions, which all indicated a desire and need for mentoring among STEM women faculty. An Emotional Competence Inventory (ECI) 360-degree feedback instrument proposed for each participant, followed by a one-hour telephone coaching session to review and explain the results, was converted to three one-hour coaching sessions for participants. More information about this change is included in the coaching section of this report. TT&B was proposed as a series of three meetings: two five-hour workshops in September and November, followed by a five-hour capstone in April. Three meetings did take place (September, November and February see online Appendix for agendas) with the capstone component focusing on long-term career visioning. Each participant was encouraged to develop a career plan and to that end engaged in “career-planning actions” with “homework assignment” between the workshops.

The original proposal included the Management Team meeting with the leadership at the partner institutions. This activity was deemed unfeasible for two reasons: 1) scheduling conflicts and 2) the preliminary nature of the To Tenure series. It was instead determined that providing a summary report to
IDEAL co-directors and presenting about TT&B at the IDEAL Plenary Conference in fall 2012 would be a more expeditious means of engaging administrative leadership at the six institutions. The workshop series was evaluated in several ways with a pre- and post self-assessment by participants of their skills/knowledge attitudes, and with a post-workshop instructor feedback survey providing input about the value of specific training modules highlighted in the evaluation section. The evaluation instruments are included on the supplemental documents page www.case.edu/provost/ideal/forwardreport.html. The raw data can be made available to the Pay It FORWARD PI’s upon request.

The following remainder of this report describes the activities in five sections: 1) participant demographics/attendance, 2) the workshop content, 3) the coaching component, 4) evaluations and outcomes, and 5) the budget.

Section 1: Participant Demographics

The target population for this workshop consisted of 85 pre-tenure women STEM faculty identified at six Northern Ohio research universities (the IDEAL partners): CWRU, BGSU, CSU, KSU, UA and UT. The IDEAL schools were offered seven openings to nominate tenure-track faculty for participation (see table below).

All IDEAL STEM departments are NSF fundable, but the specific departments included vary by institution. Each institution was encouraged to nominate or select multiple participants from each school to help develop or increase a peer network for faculty who are often isolated in their home departments. The IDEAL project Co-Directors and Change Leader Team members contacted and nominated eligible faculty. A total of 23 faculty were nominated by their mentors, department chairs and deans. Several participants noted in an open discussion that being nominated by dean caused them to take the workshop more seriously. Without that nomination they would have been hesitant to attend a program designed for women in STEM because of a perceived stigma.

<table>
<thead>
<tr>
<th>Female STEM Faculty in IDEAL 2009 - 2010</th>
<th>Tenure-track pool</th>
<th>Nominated for TT&amp;B</th>
<th>Nominated and Attended TT&amp;B</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>N</td>
<td>%</td>
</tr>
<tr>
<td>BGSU</td>
<td>7</td>
<td>1</td>
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</tr>
<tr>
<td>CWRU</td>
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<td>CSU</td>
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<td>4</td>
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</tr>
<tr>
<td>KSU</td>
<td>22</td>
<td>4</td>
<td>18%</td>
</tr>
<tr>
<td>UA</td>
<td>10</td>
<td>5</td>
<td>50%</td>
</tr>
<tr>
<td>UT</td>
<td>9</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>85</td>
<td>23</td>
<td></td>
</tr>
</tbody>
</table>

Of the 23 nominated faculty 17 accepted the nomination and completed the pre-workshop assessment survey. The survey was used to gather demographic information and target the workshop modules to the needs and interests of the participants.

Of those 17 nominees who accepted

- Family life:
  - 16 had a partner or spouse

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15 had one or more children
2 of the 17 were responsible for elder care either locally or through travel

Years since degree
6 received their PhD in the last 5 years
11 received their PhD 6 -12 years ago
1 declined to answer

Post-doc
10 completed one post-doc
4 completed two post-docs
3 did not complete a post-doc

Rank
15 Assistant Professors
2 were Associate without tenure

Years at institution
Under one year (3)
1 year (4)
2 years (6)
3 or more years (3)

Disciplines represented
7 from engineering disciplines (4 BME, 2 Civil, 1 Chem Eng.)
4 from biological sciences (2 Biology, 2 Physiology/Biophysics)
2 from Medical Sciences (Genetics and Infectious Diseases)
1 Psychology
1 Geology

Zero participation by the pretenure faculty at BGSU and UT was attributed to the distance required to attend and lack of networks for carpooling. Administrations at both universities are eager to offer this opportunity to their faculty if a no-cost extension is granted for the use of the funds not expended in 2011/12. Scheduling the To Tenure and Beyond workshop series to alternate locations at the two campuses would begin to forge additional peer networks between the universities.

Section 2 - Workshop Content

Workshop I: Self-Awareness
The first module focused on self-awareness and launched the process of intentional change, with a 5-step model involving 1) creating a personal vision of one’s desired future, 2) assessing one’s current state relative to that vision, 3) developing a plan of learning/action to move from the current to the desired state, 4) experimenting with and practicing new behaviors as outlined in the learning/action plan, and 5) drawing on the support of trusting others at every step of the process. The module introduced the concept of executive coaching and charged participants with the assignment of developing SMART goals prior to workshop II. Work/life integration topics included self-awareness of time management and boundary setting with students and service obligations

Day One Objectives:
• Introduce concepts – self-awareness, SMART Goals, Work life integration
• Establish group cohesion – ice breaker, work in pairs, small & large group discussion
• Engage participants in preliminary career planning activities – values and interests inventory, identifying short term SMART goals,
• Invite panel of speakers for lunch

Agenda
  o Unit One: Intentional change
  o Unit Two: SMART Goals
  o Senior Faculty Lunch and Panel
  o Unit Three: Work Life Integration
  o Large Group discussion

Workshop II: Power, Politics and Influence
Module two emphasized understanding the dynamics of power, how women experience power and self-discovery of personal comfort with power. To encourage a broad vision for a career plan where tenure is a single milestone, the lunch panel was asked to describe their career trajectory, especially any branch points where a new direction was added in research, professional engagement or service. Participants also had an opportunity to learn from a faculty member experienced with promotions and tenure committees how they might monitor and develop the tools necessary for the academic process.

Day Two Objectives:
• Introduce concepts – power, negotiation, mentoring
• Expand presenters to faculty in leadership positions
• Engage participants in accountability for SMART Goals, preliminary career planning

Agenda
  o Unit One: Power and Politics
  o Lunch and Mentoring Panel: “What I wished someone had told me…”
  o Unit Two: Successfully Advancing in the Tenure Track
  o Large Group Discussion:

Workshop III: Developing the Career Plan
In this final session participants engaged in visioning their career plan and steps to accomplish both long and short-term goals. In response to session evaluations best practices for managing, training and advising students were discussed as key components of successful lab management.

Day Three Objectives:
• Introduce concepts – Visioning, Mission and Vision of Career; Active student management with policy setting/enforcement, productivity expectations, and self-study as mentor
• Presenters – senior researchers with mentoring reputation
• Engage participants in accountability for SMART Goals, developing a vision statement and their long-term career goals

Agenda
  o Visioning
  o Lunch Panel: Managing Students in the Lab
  o Unit Two: Creating Roadmaps for Students
  o Wrap-up

Section 3: Coaching Component
The coaching component for To Tenure and Beyond program was intended to assist the participants in expanding their capacity for positive change in terms of reaching tenure and promotion goals. An Emotional Competence Inventory (ECI) 360-degree was part of the initial proposal but was determined to be potentially overwhelming for pretenure faculty given the difficulties they may already be subject to as women in STEM. An online tool was developed with similar components to an ECI inventory for participants to request feedback from their department chair and mentor/advisor. The results of the surveys that were completed were uniformly answered “good” DK/NA. Based on these results the management team decided that the assessment would not be repeated in future workshops. ECI 360-degree feedback is likely better suited to a post-tenure developmental series.

The method for engaging participants with individual coaching was to introduce participants to key issues inherent to an academic professional development plan in workshop sessions and then assign coaching meetings to take place between the sessions. Participants met with their individual coach (in person or by telephone) once between Workshop I and II and once between Workshop II and III. This schedule allowed coaches to delve deeply into the issues raised in the workshop and addressing personal challenges or obstacles participants identified in facing these issues.

Together with the coach, participants were encouraged to examine their development plan in terms of strengths and weaknesses, time commitments, and realistic goals. The goal of the coaching was for participants to create a set of guidelines and steps that meshed with the individual and her circumstances in pursuit of her career goals. The coach provided feedback on these plans, assisted in identifying concerns and challenges, and established a realistic strategy to achieve the coachee’s goals. All coaching sessions were confidential.

The academic coaching process that was used was developed under the NSF- ADVANCE program ACES (www.cwru.edu/admin/aces/) is was expanded in the IDEAL program (www.case.edu/provost/ideal/) and continues to be made available at CWRU. The TT&B coaching program made up to three coaching sessions available to all participants. Of the 13 people who participated in the TT&B program:

- 13 received one coaching session
- 9 received two coaching sessions
- 1 received three sessions

Anecdotally, about half of the participants needed to be reminded more than once to schedule their coaching sessions. More than half of the sessions were conducted over the phone as opposed to in person but all reviews of the experience were satisfactory. The greatest advantage to the coaching was the information about additional resources and motivation to fulfill the workshop assignments. Goal setting was enhanced through the coaching experience and a link to the workshops as far as continuity. According to feedback from the post-assessment survey, the two coaching sessions were viewed as the appropriate amount and the 60-minute duration of the sessions was adequate to achieve goals.

Overall, from the perspective of the coaches and from feedback shared during the workshops, the time in the coaching sessions was well spent and very productive. Participants came to their first coaching session with the outline of SMART goals generated during workshop one, which served as the starting point for conversation. Scheduling coaching sessions directly after each workshop allowed the coaches to reinforce the learning and for conversation to center on workshop relearning and reflection. While the coachees saw the connection between establishing goals and action plans to achieve their most important long-term outcomes with their present performance, the long-term aspect had to be reinforced, and
connections made for them, at each session as the coachees were naturally remained focused on present performance and challenges.

Participants were very eager to discuss current issues (dealing with department chairs, different “camps” and politics in their departments, managing their labs, etc.) and generate ideas and strategies related to these issues.

Coaching evaluations indicated that 100% of coaches were satisfied with their experience with the majority of respondents valuing it for the motivation and the resources provided. One participant commented:

“I really valued the coaching sessions in addition to the workshop. This is something that I would like to continue in the future. I've told all my colleagues what a great experience this has been.”

An ongoing challenge of academic coaching is how to help coachees with methods to sustain the process, once the coaching ends. Although the coachees believed in the merit of development plans/learning agendas, they are swamped with daily tasks that cause them to lose focus on the bigger picture over time. Based on this experience, the management team would recommend that future workshops increase the number of coaching sessions for each participant to a total of four: one coaching session between workshops one and two, one session between workshop two and three, one session after workshop three and a follow up session 3 – 6 months after the conclusion of the workshop, corresponding with the start of a new academic year.

Section 4 – Evaluation

The TT&B workshop series was evaluated in several ways with a pre- and post self-assessment by participants of their skills/knowledge attitudes etc., and an instructor feedback survey providing input about the value of specific training modules. The survey was developed using questionnaires created for the NSF-ADVANCE award ACES for women faculty prior to their engaging with the coaching intervention. The session evaluation used a four point scale where 4 was excellent, 3 was good, 2 was fair, 1 was poor and 0 was Not Applicable for both overall assessment and the unit specific feedback. This instrument used the FORWARD evaluations as a model.

Pre-assessment Summary

There were 17 responses to the pre-assessment survey. These responses were used to customize the workshop modules to the specific skills the participants indicated they wished to gain from the workshop like networking (7), skill building (7), understanding tenure (4), understanding politics (3) and building a career plan (3). Time management, work life balance and teaching/training concerns were also mentioned.

To the question “What gives you the most satisfaction in academic life?” respondents stated research (10x), teaching/training students (9), presenting data/interacting with colleagues (4) and grants (1).

The biggest challenges to achieving tenure were reported as obtaining funding (10), publishing (8), time management (3) and work/life balance.
The open-ended question “Do you have anything you wish to add” received a desperate plea (“Please make it better for me so I don't feel like I am overwhelmed all the time”), but mainly excitement that the program was being offered (“I can't wait to get started!”; “You cover it all! Great Survey”; “I'm very excited about this opportunity. Even this questionnaire has me thinking about how to handle some of my current struggles differently”).

Post-assessment Summary

Of the 13 faculty who attended the workshop only 10 completed both the pre and post survey. Their responses are summarized below.

In the post-assessment the biggest challenges to achieving tenure were ranked as obtaining funding (5), time management (4), departmental support (2) and publishing, a slight shift from the pre-assessment ranking of funding, publishing, and time management.

The biggest challenges to achieving tenure were reported as obtaining funding (10), publishing (8), time management (3) and work/life balance. In the post-assessment the biggest challenge to achieving tenure was reported as obtaining funding (5), time management (4), departmental support (2) and publishing.

One of the goals of the workshop was to build a learning community to foster networking among the participants. The impact of that was measured with the two questions “Please rate the extent to which you feel connected to a network of scholars in your discipline” and “Did this workshop provide an impetus for you to forge any new relationships?”.

- 6 out of 10 respondents felt more connected to a network of scholars with the remaining four reporting no increase due to feeling very connected before and after the workshop.
- 5 out of 10 forged new relationship with TT&B peers
- 4 out of 10 forged new relationships with colleagues across their discipline
- 3 out of 10 increased their proactive steps to increase their scholarly visibility since the beginning of the workshop
- 3 out of 10 actively pursued mentoring outside of their discipline
- 3 out of 10 increased their optimism about achieving tenure at their institution
- 3 out of 10 forged new relationships with peers at their university
- 2 out of 10 forged relationships with guest speakers

The overall response to the series was positive with one participant commenting: “Wonderful experience that has already helped me move my career forward. Thank you for the time and effort that went into planning and executing each session. These are lifelong skills that I will share w/ my colleagues.”

100% of the respondents would recommend this workshop to colleagues and answered the question “How would you describe this workshop to a colleague?” in the following way:

- I would describe it as an opportunity (around all your other daily responsibilities) to focus solely on your career and have an opportunity to think and plan your needs for your future career and where you want it to take you.
• This workshop is very useful to help you succeed in your career. It has a nice balance of panel discussions, group discussion, lectures and personal coaching. I highly recommend it. It covers every thing from goal setting, time management to the value of networking and how to manage students.
• A very personal, and useful workshop developing important skills for attaining tenure and identifying and achieving goals after tenure. You'll meet amazing women at all stages pre-tenure and post-tenure and learn from their experiences--what worked for them and what didn't work for them.
• It's a great opportunity to spend time talking about and thinking about your career (and life) with some amazing colleagues and coaches.
• An interesting and important opportunity to consider your career path in a more structured way with a small group of women struggling with similar challenges.
• Opportunity to share experiences, learn from others and develop some relationships with researchers from other departments and universities.
• Yes [I would recommend this workshop to a colleague]. In fact I have concrete plans to share some of the lessons and exercises w/ colleagues at my local institution.
• This workshop provides tools to get familiar with and how to go about organizing the issues important for tenure and post-tenure.

Workshop experience feedback indicated participants were split 50/50 for having the workshop in one semester or spread over the academic year, and 80% approving of the 6-hour time frame. Asked to rank their preferred content delivery format, participants overwhelmingly preferred large group discussion (1st choice by 50% and 2nd choice by 40%) followed by panel discussions (1st choice 40% and 2nd choice 40%), lecture presentation (3rd choice 60%) with small group/pairs discussion least preferred (4th choice 60%).

Workshop Evaluations Summary

<table>
<thead>
<tr>
<th>Helpful info</th>
<th>Useful strategies</th>
<th>Opportunity to network</th>
<th>1st Group discussion</th>
<th>Overall effectiveness</th>
<th>Unit 1</th>
<th>Unit 2</th>
<th>Lunch Panel</th>
<th>Unit 3</th>
<th>2nd Group Discussion</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.36</td>
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<td>3.33</td>
<td>3.75</td>
<td>2.91</td>
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</table>

Workshop One was rated 3.36 on a four-point scale for overall effectiveness with the highest rated activity being the lunch panel (3.75) followed by the group discussions (3.57 and 3.54). The lowest rated section was Unit 3: Work Life Integration (2.91), which had the participant comment “Not too specific. More time on this subject. Not enough skills to address this problem.”

Participants noted learning
• “Easy ways to make changes”
• “That it is important to be assertive and visible, and strategies to do this”
• “Change is a process that starts from acknowledging where you come from and envisioning where you want to go.”
• “I found it very instructive to specifically list my goals and to discuss concrete action plans”
• “Be more assertive and proactive.”

Reflections on the day included:
“This was much more valuable than I thought it would be -- I really enjoyed myself! I loved the discussion and meeting other women in a similar situation. I would love to have a session on how to manage students!”

Based on four of the seven participants who commented requesting that we include information on managing students in a future workshop, the content was added to day three.

Workshop Two – November 17, 2011

<table>
<thead>
<tr>
<th>Helpful info</th>
<th>Useful strategies</th>
<th>Opportunity to network</th>
<th>1st Group discussion</th>
<th>Overall effectiveness</th>
<th>Unit 1</th>
<th>Unit 2</th>
<th>Lunch Panel</th>
<th>2nd Group Discussion</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.60</td>
<td>3.70</td>
<td>3.10</td>
<td>3.80</td>
<td>3.70</td>
<td>3.22</td>
<td>3.50</td>
<td>3.7</td>
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</table>

Workshop Two was rated 3.70 on a four-point scale for overall effectiveness with the highest rated activity being the 1st group discussions (3.80) where they discussed their homework assignment from Day One, and the lunch panel (3.70) featuring Deputy Provosts from CWRU and KSU. The lowest rated section was Unit One: Power and Politics (3.22), which had two participants commenting that they wished for more concrete examples and activities.

Participants noted learning
- “[I need to] Become the expert in my field.”
- “Hearing a provost suggestions for tenure”
- “Most helpful was discussion of potential pitfalls in tenure/promotion process.”
- “Power network -- I've thought a lot about this -- but creating the network was really useful”

Reflections on the day included:
- “Keeping positive and focused. I'm really excited about the next workshop -- developing research direction, career path!”
- “The assignment will make me think. Kudos to you for challenging me!”
- “I appreciate the group discussions the most.”
- “Suggestions/strategies shared were excellent”
- “I think a lot of things that Dr. Chandler said were profound and eloquent. Thank you for bringing him to the workshop. I love the way he articulated his advice in a way that was applicable to us @ all levels.”

Workshop Three – February 20 2012

<table>
<thead>
<tr>
<th>Helpful info</th>
<th>Useful strategies</th>
<th>Opportunity to network</th>
<th>Group discussions</th>
<th>Overall effectiveness</th>
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<td>3.57</td>
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The Workshop Three evaluation inadvertently left out the evaluation sections for the Lunch Panel, Unit One: Visioning and Unit Two: Managing Students in the Lab. This workshop evaluation did not differentiate between the 1st and 2nd group discussions, instead asking the question “Group Discussions were useful”.

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The workshop was rated 3.57 on a four-point scale for overall effectiveness with the highest rated area being the useful strategies (3.85). The lowest rated area was Opportunity to Network (2.85) and one participant commented that they “really missed the people that didn't show, the critical mass was not quite present.”

Participants noted learning:
- “Management of students was helpful”
- “[About the] Faculty mentoring handbook”
- “Get help when managing learners in a lab. I liked the mission/vision/value and the RVW 2032 [homework] exercises.”
- “[How to] Vision; managing students, to have specific expectations for students.”
- “My values and how they fit into my vision. Very useful -- Rate = 4; Managing students with specific tools.”
- “I like the vision/mission statement session. Regardless of what I “do” I know what I want to “be.” For me, the being is more important than the doing.”
- “Tools how to better deal with students.”

Reflections on the day included:
- “An excellent program I will recommend to other faculty. Would be delighted to provide "testimonial" for grant review/update.”
- “Good lunch -- use this caterer again. Great performance review sheets [student roadmaps]. I'll definitely implement something similar. I also like the expectation sheets.”
- “I learned a lot from the panels and coaching w/ slight modifications it can be readily available for other junior faculty.”
- “Really enjoyed discussions with Rachelle Heller.”
- “The panel was very good. I enjoyed the discussions. So useful.”

Suggestions for improvements/future sessions offered included:
- “Minor - please bring 3-hole punch. Managing students could be broadened out to other personnel, techs, assistants, & other levels of learners. Managing a highly motivated medical student vs. lazy technician requires different skill sets/approaches.”
- “Would have been nice to focus on recruitment of students.”
- “I found the homework assignment leading into the session difficult, because it focused on the "doing."
- “I think this session would benefit by a discussion of management styles. It would help to know what type of manager I am to know how I can manage well.”
- “Do this online? Skype? Driving ~1hr is a small downside”
- “Life-work balance. More on that would be helpful.”
- “Please, more on work/life balance! Men don't struggle w/ Mommy-guilt.”

**Section 5 - Budget**

The workshops took place in the Mandel Center for Nonprofit Organizations Building on the CWRU campus with all equipment including in the cost of the rental. Materials, food, parking and travel reimbursements and coaching fees were the associated costs reflected in the budget breakout below.
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<thead>
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<th></th>
<th>Requested</th>
<th>Actual</th>
<th>Remainder</th>
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<tbody>
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<td>Parking</td>
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<td>Room rental</td>
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<tr>
<td>ECI 360 (changed to coaching)</td>
<td>4,800</td>
<td>1,787.25</td>
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<td>Materials (Handouts, binders etc.)</td>
<td>600.00</td>
<td>403.30</td>
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<td><strong>Total</strong></td>
<td><strong>$9,429</strong></td>
<td><strong>$4,773.57</strong></td>
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Only $4,773.57 was spent from the $9,429 granted by the FORWARD project. The discrepancy stems from the lack of participation by two of the six partner schools and the decision to refrain from using the Emotional Competence Inventory 360 with pretenure faculty.

**No-Cost Extension**

We would like to request a no-cost extension to use the money to conduct the workshop series for the Bowling Green State University and University of Toledo faculty who could not commit to the travel. Administrators at both universities are committed to supporting the series, engaging their pretenure faculty and serving as panelists and advisors. Please see attached no cost extension request for more detail.

**Outcomes**

The foundational accomplishment of this program was to raise an awareness in the participants on the options they have for moving towards tenure. Achieving tenure is not a passive exercise but one in which the faculty members should develop opportunities to advance their likelihood of achieving tenure.

The participants were encouraged to plan their careers in academia intentionally where achieving tenure is one goal on their path to being leaders in their disciplines. Outcomes included the creation of career action plans and goals, concrete skills and tools for improved performance and an enlarged community of peers.

Unfortunately, due to budgetary constraints, the long-term outcome of embedding the *To Tenure and Beyond* workshop as part of the Faculty Leadership Development Institute at CWRU and making it available (fee-based) to other university faculty in the region remains under consideration with the Office of the Provost.