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3 WORKLOAD POLICY FOR FULL-TIME FACULTY

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5 PURPOSE: To establish college-wide policies and procedures governing the assignment of
6 workload for members of the faculty who occupy full-time positions (1.0 FTE) in academic
7 schools/programs and who have the rank of lecturer, instructor, assistant professor, associate
8 professor, and full professor.

9
10 I. DEFINITIONS

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12 Members of the faculty who occupy full-time positions in academic schools/programs and who
13 have the rank of lecturer, instructor, assistant professor, associate professor, and full professor
14 are referred to as members of the faculty or faculty members. The phrase professional activity is
15 used to refer to all forms of research and creative activity carried out by a faculty member.

16
17 II. BASIC PRINCIPLES

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19 The regularly assigned duties of all members of the faculty consist of teaching, professional
20 activity, and/or service each academic year depending on the nature of the position. The
21 distribution of effort among teaching, professional activity, and service may vary from faculty
22 member to faculty member and from fall semester to spring semester. However, the distribution
23 of effort should always balance the scholarly and service interests of individual faculty members
24 with their responsibility to deliver academic programs of high quality. This variation in the
25 distribution of faculty effort is desirable because it allows optimization of faculty contributions
26 to professional and institutional goals.

27
28 III. GENERAL DISTRIBUTION REQUIREMENTS

29
30 The workload of a faculty member is represented by 30 workload units per academic year².
31 The suggested ranges for faculty workload for teaching, professional activity and service are
32 detailed in the table below and are to be satisfied on an academic-year basis:

33

	Tenured Faculty		Tenure-Track Faculty		Non-Tenure-Track Faculty	
	Workload Unit Range	Percent Effort Range	Workload Unit Range	Percent Effort Range	Workload Unit Range	Percent Effort Range
Teaching	12 – 24	40 – 80%	12 – 21	40 – 70%	18 – 30	60 – 100%
Prof. Activity	3 – 15	10 – 50%	6 – 15	20 – 50%	0 – 12	0 – 40%
Service	3 – 12	10 – 40%	3 – 9	10 – 30%	0 – 12	0 – 40%
Total	30 units	100%	30 units	100%	30 units	100%

¹ Adapted with permission from the Boise State University Workload Policy
(http://www.boisestate.edu/policy/policy_docs/4560_FacultyWorkload.pdf)

² Although this is stated in terms of an academic year, it should be thought of as a workload of 15 units each semester.

34
35 For the vast majority of faculty, their workload should fall within these ranges. But, in unusual
36 circumstances, with the review and approval of the Dean upon the recommendation of the
37 relevant School Director, workload can fall outside these ranges. Currently, the typical workload
38 for a tenured or tenure-track faculty is 60% teaching and 20% each for professional activity and
39 service. Colleges and schools/programs may place restrictions on the range of values allowed for
40 the workload as long as the total remains 30 workload units.

41
42 **IV. WORKLOAD VALUE OF TEACHING AND SERVICE ACTIVITIES**
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44 Examples included in this document should not be interpreted as requirements, but rather as
45 potential ways this policy could be interpreted. These are just examples and are not intended to
46 be rules for implementing the policy.³
47

- 48 A. Total Workload: The workload distribution for an individual faculty member may vary from
49 the fall to the spring semester of a calendar year, but must always total 30 units for the
50 calendar year⁴.
51
- 52 B. Lecture Courses: A lecture course is an established on-campus course that consists entirely of
53 class meetings devoted to the presentation and discussion of course content and student
54 assignments. The workload value (units) assigned to an undergraduate lecture course is
55 normally identical to the number of course credits. An optional adjustment (increase or
56 decrease in units) may be used by a school/program to take into account additional factors
57 that significantly impact effort (such as large enrollment, help from graduate teaching
58 assistants, service learning, or hybrid courses). Examples: a 3-hour class of 200 students
59 with no teaching assistants might count as a 4-hour class, a 3-hour class of 200 students with
60 5 teaching assistants might count as a 3-hour class, and a 3-hour class of 5 undergraduate
61 students might count as a 2-hour class.
62
- 63 C. Clinical Courses: Clinical courses are taught in applied settings, such as K-12 classrooms,
64 offices, courtrooms, field camps, clinics, or similar settings, with an emphasis on the practice
65 of professional skills under the supervision of a university-authorized preceptor. The
66 workload value (units) assigned to an undergraduate or graduate clinical course is determined
67 by each program subject to constraints imposed by the policies of the program, school and
68 college. If a specialized accrediting body places limits on the teaching of clinical courses in a
69 particular program, then these limits must be respected by college, school and program
70 workload policies. To the extent possible, best practices for faculty-student ratios as outlined
71 in the literature should be followed in clinical settings. As clinical courses can be extremely

³ Many of the examples are not currently viable from a financial standpoint as they would require additional resources which aren't available. However, they were included anyway as options to consider as resources become available or to use in special circumstances when resources can be made available. Faculty workload is not always accurately captured by the assignment of FTE and some of these examples are intended to more accurately capture the actual time commitments required of faculty. Variations across faculty, programs and colleges do exist and programs are encouraged to create their own examples that make sense for their particular set of circumstances.

⁴ While faculty are contracted on an *academic year*, faculty are evaluated on a *calendar year*. What is relevant here is that each semester is 15 units of workload.

72 time-consuming, every effort should be made for the workload value (units) to match the
73 actual time required.
74

75 D. Other Courses: The university offers a large number of undergraduate and graduate courses
76 that are not easily classified as lecture or clinical courses, such as independent study, foreign
77 study, practicum or internship, conference or workshop, seminar, readings and conference,
78 directed research at the undergraduate or graduate level, courses taught by distance methods,
79 laboratory courses, and courses that include a laboratory (or similar requirement) that is not
80 assigned separate credit. The workload value (units) assigned to each of these types of
81 courses is determined by each school/program subject to constraints imposed by the policies
82 of the school/program and college. Examples: a 2-hour lab course with no teaching assistant
83 support might count as 2-hour class; first time teaching a distance delivery course that
84 involved development might count as 1 additional unit; independent study courses could
85 accrue credit so that 9 hours of independent study might count as 1 unit.
86

87 E. Graduate Culminating Activities: Effort expended by a faculty member on graduate
88 culminating activities (e.g., thesis, project, dissertation) may be included as part of the
89 teaching workload, but only to the extent that the culminating activities are represented by
90 registered academic credits. The workload value (units) assigned to a graduate culminating
91 activity is determined by each program subject to constraints imposed by the policies of the
92 program, school and college. Credit should be given to a faculty advising a dissertation
93 student upon successful completion of their dissertation. A possible means of accounting for
94 this credit is through a "banking" system, in which credit is tallied and workload
95 reassignment provided at a future date. -Example: A completed master's thesis might count
96 as 0.5 units; a completed dissertation might count as 1 unit.⁵
97

98 F. Program/School Administrative Assignments: The workload represented by school/program
99 administrative assignments (e.g., program coordinators, undergraduate or graduate
100 coordinators) during the academic year is included in the service workload. The workload
101 value (units) assigned to an administrative assignment is determined by each school/program
102 subject to constraints imposed by the policies of the program, school and college. Example:
103 a faculty member who was already engaged in significant service and, in addition, was
104 assigned to be the graduate coordinator for a program might be reassigned from 3 hours of
105 teaching to 3 hours of service; significant service items could also be assigned a service
106 workload.
107

108 G. General Student Advising: The workload represented by general student advising that is not
109 associated with a particular course or graduate culminating activity is included in the service
110 workload. The workload value (units) assigned to an administrative assignment is determined
111 by each program subject to constraints imposed by the policies of the program, school and
112 college.
113

114 V. DEVELOPMENT OF WORKLOAD POLICIES AND PROCEDURES WITHIN THE 115 SCHOOLS/PROGRAMS

⁵ This is a situation where tuition is actually being generated by the student for the thesis hours.

- 116
117 A. Each school and program is responsible for developing and maintaining written workload
118 policies and procedures that have been approved by the college dean. There must be
119 consistency within the hierarchy of policies and procedures; that is, the school and program
120 policies and procedures must be consistent with the college policies and procedures, and the
121 college policies and procedures must be consistent with the university policy.
122
123 B. At a minimum, the policies and procedures developed by a school/program must require the
124 following:
125 a. uniform application to all faculty members of the school/program;
126 b. for each faculty member, joint development (by the faculty member and the program
127 coordinator/school director) of an annual written workload description that includes
128 goals aligned with the workload assignment that is approved by the school director
129 and college dean early in the calendar year;
130 c. linkage of the annual workload description, including goal-setting, to the annual
131 faculty evaluation and merit pay; and
132 d. definition of a mechanism for implementing workload modifications during the
133 academic year as the need arises.
134
135 C. If the workloads of individual faculty, members and/or collective faculty within a
136 school/program exceed the 30 units per faculty member limit set by UNC Board Policy, the
137 appropriate director, dean, or provost will re-examine workload assignments and bring them
138 into conformity with the 30 hour workload policy. If necessity demands that faculty
139 workload exceeds the 30 unit limit, faculty members will receive additional compensation.
140

141 VI. WORKLOAD ASSIGNMENT IN THE CASE OF A SALARY BUYOUT

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143 A faculty member can be paid (in whole or in part) by a sponsored project during an academic
144 year under an arrangement known as a salary buyout. In the case of a salary buyout, the
145 workload of the faculty member continues to total 30 units for the academic year, but the
146 workload distribution now includes a prescribed number of units assigned to the sponsored
147 project, and it may not be possible to meet the distribution requirements among teaching,
148 scholarship, and service stated in section III. The percentage of the total academic year salary of
149 the faculty member paid by the sponsored project is the same as the percentage of the total
150 academic year workload assigned to the sponsored project.
151

152 VII. The policy does not apply to faculty members on sabbatical leave, military leave, or family
153 medical leave.
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