

At the same time the Working Group was conducting its work, the Faculty Governance Committee of the Faculty Senate began consideration of faculty teaching loads. A sub-committee was formed which recommended a Faculty Teaching Load Policy including credit hour equivalent standards based on a draft policy initially contained in a UNC-GA document on teaching loads. The Faculty Governance sub-committee was invited to participate with the Working Group in the analysis of the 1996-97 Annual Reports on Faculty Teaching Loads. In August, 1997, Paul Hartley (Art), a member of the sub-committee, joined Patricia Anderson as representatives of the Faculty Governance Committee on the Working Group.

Several other individuals joined or left the Working Group. Byron Coulter and David Watkins left the group, with Carson Bays (Economics) and Caroline Ayers (Academic Affairs) taking their places.

In September, 1997 the Working Group and Faculty Governance representatives began their analysis of the teaching loads as reported in 1996-97 Annual Reports on Faculty Teaching Loads. The departmental teaching load reports were aggregated at the college/school level and for the university as a whole. The reports were also broken down according to faculty rank and tenure/tenure track status. (These reports may be reviewed after 10/13/97 at <http://www.aa.ecu.edu/tl/>.) In addition, the group considered other information on average preparations per faculty and average class sizes. The group divided itself into six small sub-groups to examine six general categories of disciplines according to their teaching load practices and stated credit hour equivalents. One key aspect of each group's consideration was the comparability of the proposed Faculty Teaching Load Policy from the Faculty Governance sub-committee and the impact of its adoption by the university.

Among the conclusions of the analysis are:

1. Any policy relative to teaching loads or unit workloads must serve both to assist the unit in making initial assignments prior to the commencement of any semester and then in appropriately crediting the subsequent activities of the faculty. Many activities which will lead to a faculty member having an overload cannot be fully anticipated prior to the beginning of the semester.
2. There was substantial variation in how the various departments, even those which one would expect to be comparable, reported their faculty teaching loads. Some of this variation was due to the newness of the reporting process itself and confusion over how to count some activities appropriately.
3. Even considering #2 above, it is clear that there is considerable variation in the level of documentation across the campus as to how departments make workload decisions and award credit hour equivalents. According to their reports, many departments do not have credit hour equivalent policies and others have such practices, but do not have them in written form. There are established, but unwritten, practices.
4. It is also clear that departments vary considerably in their teaching assignments, their use of reassignments or reductions, and their reasons for granting faculty reassignments or reductions.

mailed to F.S. - 10-9-97

## Report

### Measuring Teaching Loads

10/9/97

approved by  
Faculty Senate  
97-33

#### Introduction

On April 12, 1996, the Board of Governors adopted "A Plan for Rewarding Faculty Teaching." This plan introduced a new system for the establishment of standard departmental teaching loads, the monitoring of individual faculty teaching loads and the reporting of resulting data to the General Administration. These data had not previously been systematically collected and reported across the constituent institutions of the University of North Carolina.

#### The Working Group on Measuring Teaching Loads and the Faculty Governance Committee

In response to the adoption of the BOG's plan, the Working Group on Measuring Teaching Loads was appointed by the Chancellor to examine its implications and to recommend an appropriate university response. During the 1996-97 academic year, the following individuals participated: Michael Dorsey (Dean, Art), John Swope (Associate Dean, Education), Brad Foley (Dean, Music), Byron Coulter (Associate Dean, Arts and Sciences), Dave Watkins (Associate Vice Chancellor, Academic Affairs), Gary Vanderpool (Associate Vice Chancellor, Health Sciences), Terri Lawler (Associate Dean, Nursing), Buddy Zincone (Associate Dean, Business), Scott Snyder (Chair, Geology), Paul Tschetter (Associate Dean, Graduate School), Renee Jarvis (PIR), Robert Thompson (PIR) and Patricia Anderson (Education), the ECU representative on the UNC Task Force on Measuring Teaching Loads and Chair of the Faculty Governance Committee (1997-98). The group was chosen to represent a diversity of academic disciplines, teaching settings, range of program offerings, and research/creative activity patterns. The aim was to capture much of the diversity of the university within a small enough group that discussion could take place. The group was also composed largely of individuals who have had experience in making faculty workload assignments and could judge the potential implications of the BOG for their unit.

Among the basic recommendations of the Working Group for the 1996-97 academic year were:

- The 1996-1997 Annual Report on Faculty Teaching Loads be completed by department chairs based on departmental assignment practices and procedures that were in effect at the time assignments were made for that academic year. In other words, no changes were to be implemented for the reporting of the 1996-1997 data. Each department chair would also attach a copy of any existing departmental policies or prepare a summary of such practices when submitting the 1996-1997 Annual Report on Faculty Teaching Loads.
- During the 1997-1998 academic year a review of current departmental assignment practices, procedures, and current course credit hour equivalency practices be conducted under guidelines to be established by the Chancellor, Vice Chancellor for Academic Affairs, Vice Chancellor for Health Sciences, and Vice Chancellor for Research and Graduate Studies.

15. Off-Campus Scholarly Assignment/On Leave: Include reassignment credit for off-campus scholarly assignment or leave with or without pay. (This will typically show as 12 hours reassigned for the semester.)
16. Other Research/Service: Include reassignment credit for research or service activities not covered above. (An explanation should be attached to the Annual Faculty Teaching Load Report.)

TO: Faculty Senators

DATE: 9 October 1997

Please review this information prior to the Faculty Senate meeting scheduled for **Tuesday, 14 October 1997**. This item will be offered as new business at the appropriate time. Thank you.

5. The examination of departmental reports also indicates that some units need to review the structure of their curriculum and the reasons for faculty overloads. Some units report relatively high overloads that may be related to the structure of their curriculum.
6. Units which have individualized instruction courses such as honors, independent study, independent reading, internships, or thesis courses and centralize permission to enroll in them, should review their procedures relative to course credits and faculty teaching loads. If the unit centralizes permission to enroll in such courses, it should create a separate course section for each faculty member who has been chosen to work with the student. This will enable the course credit to be given directly to the appropriate faculty member. This can be done when the class schedules are submitted to the Registrar's Office or as needed later.

After consideration of the departmental reports and discussion of the Faculty Governance sub-committee's proposal, the attached procedures and guidelines for developing unit workload policies and University Faculty Teaching Loads Policy are recommended for adoption.

This recommendation is also supported by the Faculty Governance Committee as a working document.

## University Faculty Teaching Load Policy

### Procedures for developing unit workload policies

It is recommended that the following definitions and standards be adopted as guidelines for a university workload policy and that each individual unit develop its own workload policy for aspects of faculty activity not covered below or on which the unit disagrees with the university standards. In addition, each unit workload policy should state how initial assignments will be made, how additional subsequent activities will be counted for annual evaluation purposes, and any variation in weight or use of the recommended university credit hour equivalents. (The School of Medicine is exempt from this policy.)

The unit workload policy should be developed by unit faculty in collaboration with the unit head. Units with faculty holding full-time appointments beyond the usual 9 month contract period should develop workload policies appropriate to the contract periods present in the unit. Any differences in a proposed unit workload policy and the university workload policy must be explained in an accompanying written statement and forwarded along with the proposed unit workload policy by the unit head to the dean, appropriate vice chancellor, and chancellor for concurrence. Copies of the unit workload policy should also be forwarded to the Faculty Senate Office.

Future changes to unit workload policies should follow the same approval and notification process.

### Definitions and standards:

- ECU uses 12 credit hours per semester during the fall and spring terms as its standard teaching load for faculty holding full-time appointments. Faculty workload assignments and the counting of activities for annual evaluation purposes should be the sum of the credit hours and credit hour equivalencies taught with the addition of the credit hours granted for various reassignment purposes.
- Research/creative activity reassignments should become the university norm for scholarly productive tenured and tenure track faculty
- A Credit Hour Equivalent (CHE) is a weighting granted to an instructional activity beyond or in place of the credit hours associated with the activity. It is used primarily in calculating the equivalent teaching load for courses and assigned activities not taught in the usual lecture format. Credit hour equivalents (CHEs) should be assigned according to the following guidelines.

- Reasons for Course Reduction: Faculty may be granted reassignment for work in any of the following categories. Such reassignments should be counted in credit hour terms with the unit workload policy stating the basis for the resulting credit, but should be based on work requiring an extensive commitment of time and effort.
  1. Course/Curriculum Development: Include reassignments credit for the planning, development, or preparation of course or curricula materials.
  2. Heavy Load - Academic Advising: Include reassignment credit for academic advising loads that are considered in excess of the advising duties normally expected of a faculty member.
  3. Accreditation/Program Review: Include reassignment credit for completing accreditation or program reviews.
  4. Technology Training: Include reassignment credit for participation in extensive technology training.
  5. Co-curricular Activities: Include reassignment credit for such things as faculty direction of student activities, such as dramatic productions, musical groups, or other similar activities.
  6. Academic Administration: Include reassignment credit for time allotted to perform administrative functions such as department chairs, associate and assistant deans, administrative coordinators, undergraduate or graduate directors, or directors of internal service units.
  7. Compensation for Prior Overload: Include reassignment credit for overloads performed by faculty during a prior semester.
  8. On-load Courses Deferred: Include reassignment credit for course assignments which have been deferred to a future term and result in a reduction from the standard load this academic year. Faculty on 11/12 month appointments who have deferred a portion of their fall or spring teaching load to a summer term should be reported here.
  9. Other Instructional: Include reassignment credit for instructional activities not covered above. (An explanation should be attached to the Annual Faculty Teaching Load Report.)
  10. Externally Funded Research/Creative Activity: Include reassignment credit for faculty time **bought out** by externally sponsored research, defined as research or service funded by outside resources (salary is paid in part from a restricted, research account number).
  11. Institutionally Supported Research: Include reassignment credit for time devoted to research **not bought out** by external funding (includes ECU contribution of time to work on externally funded projects).
  12. Institutional Service: Include reassignment credit for institutional or other recognized service requiring extraordinary effort. Examples may include faculty sponsorship of a campus organization, chair of faculty, chair of a specified university standing or ad hoc committees, servicing and maintaining studios or special equipment rooms, and other services outside direct course instruction but within the institution.
  13. Service to the Public: Include reassignment credit for professionally related service to the public.
  14. Service to the Profession: Include reassignment credit for service to the profession such as national association officer or editor of journals.

Credit hours and CHEs should **not** be double counted. Additional CHEs should be added only in the cases specified in # 8 below or as otherwise indicated in approved unit workload policies.

- Credit Hour Equivalent Guidelines

1. Direction of a dissertation: 3 credit hours = 1.5 CHE. (Up to the maximum credit hours permitted for the degree.)
2. Direction of a master's thesis (or equivalent project): 3 credit hours = 1 CHE. (Up to the maximum credit hours permitted for the degree.)
3. Direction of internships and practica: 3 contact hours per week in the field or in a follow up seminar = 1 CHE.
4. Supervision of Teacher Education Clinical Internships: 4 students supervised = 3 CHEs or 0.75 CHE per student supervised.
5. Studios, laboratories and activity courses that meet on a fixed class schedule and which require instructor preparation for class and evaluation of student performance: 1 contact hour per week = 0.67-1 CHE.

If instructor preparation is not required or if student performance is not evaluated, then one contact hour = 0.5-0.67 CHEs.

6. Direction of senior theses, directed readings, independent study, and other such individualized instruction: 1 credit hour = 0.2 CHE.
7. Clinical courses in nursing, allied health sciences fields, or clinical courses other disciplines which require instructor preparation for class and evaluation of student performance = 1 contact hour per week = 0.67-1 CHE.

If instructor preparation is not required or if student performance is not evaluated, then one contact hour = 0.5-0.67 CHEs.

8. Additional credit for graduate and large classes:

- a. Doctoral level courses (excluding dissertation direction): 1 credit hour = 0.5 CHE.
- b. Master's level courses (excluding thesis direction): 1 credit hour = 0.33 CHE.
- c. Large classes (as determined by the unit): 1 CHE per course.