

## **OFFICIAL**

Policy and Procedure Statement 7.05  
Review Cycle: Feb. 1, E4Y  
Review Date: 02/01/2019  
Reviewer: Provost

Faculty Workload  
(39 paragraphs)  
[Attachment 1](#)  
[Attachment 2](#)  
[Attachment 3](#)  
[Attachment 4](#)  
[Attachment 5](#)

### **PURPOSE**

1. The goal of the workload policy is to document the full professional responsibilities of the faculty. It is also designed to provide guidance to each academic unit in developing unit specific workload policies.
2. Faculty members and administrators have a right to expect that workloads will be distributed equitably and carried out efficiently and effectively. The purpose of this PPS is to define the way in which faculty members' workloads are determined and monitored.
3. This document also establishes the policy and responsibilities for monitoring and reporting faculty workload, and for reporting workload compliance to the Coordinating Board for fall, spring, and summer semesters. For the purpose of this policy, "faculty" is defined as any individuals having an academic appointment, regardless of the source of funding or assignment. Graduate/doctoral instructional assistants and graduate/doctoral teaching assistants are treated as faculty, and reported to the Coordinating Board on the Faculty Report (CBM 008).

### **DEFINITIONS**

4. For the purposes of this PPS, "academic unit" will refer to the following:
  - a. a department or school residing within a college, and/or
  - b. a degree program having a program director who reports to the college dean.For the purposes of this PPS, "chair" will refer to the academic unit leader.
5. One workload credit is defined as one semester credit hour of organized undergraduate instruction or the equivalent.
6. The normal workload for full-time faculty is a minimum of twelve semester credit hours per fall and spring semester (twelve workload units). For most tenured and tenure-track faculty at Texas State, this twelve workload unit standard is fulfilled by teaching two to three classes (6 to 9 workload credits) and conducting research and service at a level that warrants the awarding of three to six

workload credits. The normal full-time workload for a five week summer session is two courses (6 workload credits or four courses (12 workload credits) for the two five week summer sessions combined. The normal full-time workload for the separate 10 week summer session is four courses (12 workload credits).

7. The full professional responsibility in the career of a tenured or tenure-track faculty member includes his/her obligations to the University for teaching, conducting scholarly/creative activities, and providing service to the University and/or the profession. The professional responsibilities of other faculty members may include a combination of teaching, conducting scholarly/creative activities, or performing service. The division of the obligations outlined above may vary from individual to individual, and change over time.

## **RESPONSIBILITIES**

8. At Texas State, a faculty member's professional responsibilities for each semester are determined by the chair, subject to the approval of the dean. Chairs are responsible for assuring that individual faculty members' workloads comply with the University workload policy. Chairs are also responsible for assuring that faculty obligations are fairly distributed among faculty members within the academic unit. In meeting this responsibility, chairs should attempt to match the needs of the academic unit and the University as outlined in the academic unit's goals for teaching, scholarly/creative activity, and service with the individual professional goals of each faculty member. These goals are likely to change over the course of a faculty member's career.
9. The Provost and Vice President for Academic Affairs is responsible for implementing the workload policy. Each academic unit is responsible for creating a policy which delineates academic unit-specific workload, including the teaching workload credits for each course, lab, and individual instruction and any applicable assignments and/or adjustments. The Provost and the deans are responsible for ensuring workload equivalence by reviewing academic unit policies, workload reports, and monitoring policy compliance.
10. The procedures for completing workload compliance reports to assure that this standard is met are outlined in Attachment 1. Codes that are used to complete this report are outlined in Attachment 2.

## **ASSIGNMENT AND ADJUSTMENT OF WORKLOAD CREDITS**

11. Workload credit is earned during each semester in three general areas; teaching, scholarly/creative activities and service. All activities that receive faculty workload credit should be assessed to maintain acceptable standards of accountability. The total workload credits earned should be used to monitor the distribution of work assignments within each academic unit and across academic units. Workload in a semester is the sum of assigned workload credits and adjustments to workload.

- 12.** Workload assignments include workload for instruction, scholarly/creative activity and appointed positions. Workload adjustments include activities for which there is a need for temporary recognition of instruction, scholarly/creative activities and professional activities or service.
- 13.** There may be times when exceptional circumstances require a faculty member to carry a teaching (organized course) workload that is clearly beyond the normal expectations. Under these conditions, the faculty member should receive compensation/reimbursement either in the form of reimbursable workload credits or a paid stipend. Reimbursable teaching workload credits must be returned to the faculty member who earned them with a commensurate amount of release during a long semester within two years from when the credit was earned. Reimbursable teaching workload credits and paid overloads must be requested by the chair and approved in advance by the appropriate dean.

### **WORKLOAD CREDITS FOR TEACHING**

- 14.** Workload is calculated for courses, labs and individual instruction using the semester credit hour value of the course, lab contact hours or the number of students enrolled on the twelfth class day. [Attachment 3](#) summarizes the workload credits normally assigned to various types of activities as well as the maximum workload credit. Chairs may assign workload adjustments to reflect the complexity of teaching assignments. For organized courses, chairs may assign up to 1.5 times the credit hour value to a specific course. This assignment is appropriate only when preparation, instructional management, grading demands, or research activities related to the teaching assignment are much greater than normal and are not compensated with other support.
- 15.** Workload credit for graduate/doctoral instructional assistants is generated by the addition of a lab assignment credit in an amount equivalent to the individual's FTE. The lab assignment is automatically generated on the report. Graduate /doctoral teaching assistants generate workload credit by appointment as the instructor of record for a specific course. Additional credit may be provided by a workload adjustment.

Paragraphs 16-20 describe the normal methods for assigning teaching workload credits.

- 16. Lecture Courses.** Workload for lecture courses (instruction code 1 according to PPS 2.01) will be assigned based on credit hours of the lecture.
- 17. Laboratory Courses.** Workload for laboratory courses (instruction code 2 according to PPS 2.01) will be calculated based on contact hours using [Attachment 4](#) as a framework. Each academic unit should develop a specific workload formula for laboratory courses if the standard formula is not used.

**18. Combined Classroom/Laboratory.** In a combined lecture/lab course, workload credit will be assigned based on the credit hours of the lecture and the contact hours of the lab. Workload for lecture will be assigned separate from workload for lab. See [Attachment 3](#). Workload for lecture will be based on the credit hours attributed to the lecture. Workload for labs will be calculated based on contact hours using [Attachment 4](#) as a framework for the academic unit specific formula.

**19. Individual Instruction.** Individual instruction (instruction codes 3-10 according to PPS 2.01) includes, for example, student teaching supervision, private music lessons, clinical supervision, thesis, dissertation, and individual instruction. All individual instruction workload will be determined by each academic unit and will be based on course enrollment. [Attachment 3](#) provides the general guidelines for development of the specific formulas.

**20. Stacked Class.** Workload credit for a single class composed of two or more courses or class sections (stacked classes) will be granted only for one class.

Paragraphs 21-22 describe the normal methods for adjusting teaching workload credit.

**21. Laboratory Coordination Adjustment.** The chair may grant up to six workload credits per semester to a faculty member who coordinates multiple sections of laboratories. (see [Attachment 4](#)).

**22. Instructional Adjustment.** The chair may grant additional workload credit each semester in recognition of the preparation and management of a section of a course when sufficient assistance is not available, e.g. the absence of graduate or undergraduate instructional assistants.

## **WORKLOAD CREDIT FOR OTHER PROFESSIONAL RESPONSIBILITIES**

**23.** Chairs may assign credit to or adjust workload for faculty members for other appropriate professional activities and service responsibilities as outlined below. Codes for the equivalent workload credits listed below are contained in [Attachment 2](#).

Paragraphs 24-27 describe the normal methods for assigning workload credit for other professional service responsibilities.

**24. Provost Assignment.** The Dean and/or the Provost may recommend a special assignment leave for a faculty member, chair or dean. With approval from the Provost or President, up to twelve workload units per semester may be granted for special assignments.

**25. Associate/Assistant Dean Assignment.** Workload credit will be granted for faculty who serve as an associate or an assistant dean.

- 26. Chair Assignment.** Workload credit will be granted for chairing an academic unit on the basis outlined in [PPS 1.03](#).
- 27. Program Director/Program Chair Assignment.** Workload credit may be granted for a faculty member who directs a program, center, clinic, or similar unit.
- Paragraphs 28-36 describe the normal methods for adjusting workload credit for other professional activities and service responsibilities.
- 28. Academic Activity Adjustment.** Workload credit may be granted to a faculty member for preparing major documents in the fulfillment of program needs or accreditation requirements. Workload credit may also be granted for duties performed in the best interest of the institution's instructional programs as determined by the Provost.
- 29. Administrative Activity Adjustment.** Workload credit may be granted for a faculty member who chairs certain committees, task forces, the Faculty Senate, or who performs other significant administrative activities.
- 30. Academic Advising Adjustment.** Workload credit may be granted for major academic advising responsibilities.
- 31. Developmental Leave Adjustment.** Up to twelve workload credits per semester may be assigned to a faculty member who is awarded a Faculty Developmental Leave by the Board of Regents.
- 32. Professional Activity Adjustment.** Workload credit may be granted for professional activities such as editing a professional journal or serving as an officer in a professional organization.
- 33. Research/Grant Activity Adjustment.** Workload credit may be granted to a faculty member who is participating in major research or grant related activities.
- 34. Research Buy Out Adjustment.** Workload credit will be granted to a faculty member who has secured external funding to pay for a portion of his/her salary and thus "buy out" time.
- 35. Graduate Mentoring Adjustment.** Workload credit may be granted to faculty participating in graduate research mentoring, such as multiple theses, dissertations, or projects, and who is not the instructor of record.
- 36. Emergency/Work Life Workload Adjustment.** Teaching loads may fluctuate because of illness, sudden emergencies, care of a newborn child or an adopted or foster child younger than five, or other family member in need of such care, and other unanticipated needs, which may require a faculty member to request

a lighter load. All temporary exceptions to the basic teaching load policy must be in writing, and must carry the approval of the chair and the dean with a copy to the Provost.

## **WORKLOAD CALCULATION AND REPORTING**

**37.** The Faculty Records Office will distribute the workload report for review and completion by chairs following the 12<sup>th</sup> semester day.

**38.** The final internal workload report will be distributed to deans and the Faculty Senate; deans will distribute to chairs. At that time the chair will provide each faculty member with a copy of his/her workload report. A copy of the entire academic unit report or a summary report will be provided by the chair to the academic unit personnel committee.

## **CERTIFICATION STATEMENT**

**39.** This PPS has been approved by the reviewer listed below and represents Texas State's Division of Academic Affairs policy and procedure from the date of this document until superseded.

Review Cycle:

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Reviewer:

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Approved:

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Review Date:

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Date:

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Gene Bourgeois

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