CBAPPS 5.06
Workload Policy

PURPOSE
This policy statement explains the faculty workload policy. The major components of this process are:

1. Activity Plans and Reports;
2. Workload Plans

The purpose of this policy statement is to broadly define workload plans available to McCoy College. Another important goal of this policy statement is to promote a collegial environment that encourages excellence and emphasizes academic professionalism.

UNIVERSITY POLICIES

AAPPS Documents:
7.05 Faculty Workload
8.10 Tenure/Promotion Review
8.09 Performance Evaluation of Faculty and Post-Tenure Review

CBAPPS Documents:
None is specific to the Annual Activity Plan or Annual Activity Report. For information concerning teaching, research, and service, see the following CBAPPS:

2.01 - 2.16 Curriculum Policies
3.01 - 3.12 Academic Requirements and Advising Policies
4.01 - 4.13 Teaching
5.01 - 5.03 Scholarly Activities & Grants

ANNUAL ACTIVITY PLAN AND REPORT

Each faculty member will submit to his/her Department Chair, by the first week of February, an Annual Activity Plan identifying anticipated activities and objectives, including research activity planned and results anticipated, as well as a current vita. The Chair should review the plans to ensure that all departmental goals are addressed and provide feedback to the faculty member concerning the acceptability of the plan. By the first week of February, each faculty member will complete an Activity Report detailing his/her achievements. The report will be submitted to the Chair together with whatever supporting material(s) the faculty member and the Department consider appropriate. Using this material and other appropriate information, the Chair will evaluate the faculty member's performance, taking into account the nature of the faculty member's objectives as expressed in the Annual Activity Plan. To the extent possible, the evaluation should be based on performance that is clearly documented in the Annual Activity Report including student evaluations, published materials, etc. After the Chair has evaluated all departmental faculty, the Chair will meet with each faculty member to review the faculty member's report and performance evaluation. Supporting materials will be returned to the faculty member after performance decisions are made if the material(s) is not necessary for further performance review(s).
FACULTY WORKLOAD PLANS

Each faculty member will be assigned to one of the following plans. This determination is normally made once a year in the spring as part of the annual faculty evaluation process. As per current University policy, faculty in each of the following plans will be assigned twelve workload credits per semester.

Plan A – This plan is for full-time tenured and tenure-track faculty members. The Annual Activity Plan, approved by the Department Chair, will identify anticipated activities to support an active research agenda that will ensure faculty remain in the Scholarly Academic (SA) category. Faculty approved for this plan will normally teach nine workload credits per semester with three workload credits per semester assigned for research. An additional three or six workload credits per semester may be assigned to those holding endowed chairs or professorships, or other faculty for significant activities related to research, service or other contributions recognized in University PPS 7.05. Faculty members who did not maintain the SA status will move to Plan F.

Plan B - This plan is for full-time tenured Practitioner Academic (PA) faculty members. The Activity Plan, approved by the Department Chair, will identify anticipated activities to support an active practitioner interaction agenda that will ensure faculty remain in the Practitioner Academic (PA) category. Faculty approved for this plan will normally teach twelve workload credits per semester with up to three workload credits per semester assigned for significant and substantial professional activities that are unpaid, identifiable or specifically assigned. Faculty members who did not maintain the PA status will move to Plan F.

Plan C – This plan is for full-time non-tenure track Scholarly Academic (SA) faculty members. The Annual Activity Plan, approved by the Department Chair, will identify anticipated activities to retain SA status. Faculty approved for this plan will normally teach twelve workload credits per semester with up to three workload credits per semester assigned for research. Faculty members who did not maintain the SA status will move to Plan G.

Plan D – This plan is for full-time non-tenure track Scholarly Practitioner (SP) faculty members. The Annual Activity Plan, approved by the Department Chair, will identify anticipated activities to retain SP status. Faculty approved for this plan will normally teach twelve workload credits per semester with up to three workload credits per semester for practitioner research and interaction. Faculty members who did not maintain the SP status will move to Plan G.

Plan E – This plan is for full-time non-tenure track Instructional Practitioner (IP) faculty members. The Annual Activity Plan, approved by the Department Chair, will identify anticipated activities to retain status. Faculty approved for this plan will normally teach twelve workload credits per semester. Faculty members who did not maintain the IP status will move to Plan G.

Plan F – This plan is for tenured and tenure-track faculty members who fail to retain SA or PA status. For tenure-track faculty members, failure to retain SA status will cause the department to consider whether reappointment is warranted. Tenured faculty in this plan will normally teach twelve workload credits per semester, with up to three workload credits per semester for improvement. In addition, the Chair and faculty member will design a limited-time only improvement plan to help the tenured faculty member regain SA or PA status. Once the improvement plan has been implemented, the faculty member will be evaluated during the following two regular, annual department evaluation cycles. Once the objectives of the improvement plan have been achieved, the faculty member will be moved to Plan A or
B. Failure to complete the improvement plan may result in the faculty member remaining in the AACSB-designated “Other” category and teach twelve workload credits per semester.

Plan G -- This plan is for non-tenure track faculty members who fail to retain SA, SP or IP status. Faculty in this plan will normally teach twelve workload credits per semester. In addition, the Chair and faculty member will design an improvement plan to help the faculty member regain SA, SP or IP status. Once the improvement plan has been implemented, the faculty member will be evaluated during the following regular, annual department evaluation cycle. Within one year when the objectives of the improvement plan have been achieved, the faculty member will be moved to Plan C, D or E. Failure to complete the improvement plan may cause the department to consider whether reappointment is warranted.

Other Considerations – Decisions about course reductions are made at the discretion of the Chair in consultation with the affected faculty, subject to approval by the Dean. Any workload reduction must take into consideration the needs of the Department/Program, the College, and the University as well as the individual’s professional goals. Course reductions may be requested by a faculty member for one, or a combination, of the following workload credit generating activities:

* significant research activities that result in extensive publications in peer reviewed journals;
* external grants submitted and funded as principal investigators or co-principal investigators;
* significant academic advisement responsibility (e.g. PACE);
* major administrative activities;
* teaching of large sections;
* chairing four completed theses over a three-year period;
* significant university-related committee work;
* engaging in prominent professional responsibilities at the local, state, regional, and/or national level; and,
* other activities recognized in University PPS 7.05.

CERTIFICATION STATEMENT

This CBAPPS has been approved by the reviewers listed below and represents the McCoy College of Business Administration policy and procedure from the date of the document until superseded.

Review Cycle: Sept. 1, E5Y, 2020

Review Date: Sept. 1, 2020

CBAC Review:________________________ Date:____________

Governance Review:____________________ Date:____________
Approved: ___________________________ Date: ____________ Denise T. Smart

Dean, McCoy College of Business Administration

Last Update: April, 2015