

**Date:** December 8, 2023

**To:** CALES Faculty

**From:** Michael Staten, Bart Cardon Associate Dean for Careers and Academic Programs

**Subj:** Clarifying CALES standards regarding faculty instructional workload



I know that CALES Faculty Council has been fielding questions from faculty over the past year related to instructional workload guidelines and policies within the college. With this memo I am hoping to resolve much of the uncertainty. I will structure the memo around the three central questions that Faculty Council submitted to me last month. I am basing my responses in part on the guidance that we received from the Cardon Academy for Teaching Excellence (CATE) Fellows back in 2017, and in part on the evolution of teaching expectations in the intervening six years in our ongoing quest for both efficiency and equity.

**What constitutes a full-time (0.9 FTE) teaching load?** An expectation of 18 units delivered for a 1.0 instructional FTE (which includes a .10 service commitment for all faculty) has become the de-facto standard in CALES. By implication, 5% of the annual teaching FTE is satisfied through the delivery of each 1 semester credit for in-person and online classes.

This is not just a “guideline,” because it prohibits upward adjustments in expected courses to be delivered without extra compensation. Downward adjustments are permissible according to certain criteria discussed below. Every academic unit has used this tool to some degree. Making such adjustments, as needed, is part of each Unit Head’s explicit responsibility.

**Which core instructional activities should be counted towards an assigned teaching load?**

Generally speaking, in CALES we equate teaching load to the delivery of in-person or online classes. Most classes are structured as 3-credit (or 3-unit) courses, which generates a handy rule-of-thumb metric of a full-time instructional appointment equating to delivery of six 3-credit courses per year. The math to adjust for courses that carry more or fewer credits is straightforward.

The original set of CATE recommendations listed a host of activities outside of formal classroom delivery for which faculty could potentially receive credit in meeting their assigned instructional FTE. Over time, that long list has been winnowed down to a much shorter set of adjustment criteria that are actually being used. CALES began collecting information about courseloads and reasons for over- and under-delivery several years ago. In other words, when an instructional FTE suggested, for example, 12 units should be delivered during an academic year and only 9 units were actually delivered, we asked the Unit Head for an explanation. The following list captures all of the reasons we detected for under-delivery for FY 2021-22. Effectively, these are

the criteria now used in CALES for course reductions/releases, relative to the assigned teaching workload.

- Adjustment for large course enrollments
- Credit for mentoring unusually large numbers of graduate students
- Release for new course development (including some conversions of in-person courses for online delivery)
- Release for administrative work related to instructional programs (e.g., serving as a program or area coordinator; work leading to the launch of a new degree or program)
- Release for a grant buyout or for grant development
- Release as part of a new faculty startup package
- Release for sabbatical
- Release to reflect mid-year change in FTE or retirement

These reasons have now been coded into the faculty workload reporting tool that is being used annually to monitor the use of our instructional FTE for each of the 10 academic units in CALES. Unit Heads know that they are being tracked in their use of these “exceptions,” and are accountable to the Dean, as well as to each other because we display the use of exceptions by unit at the end of each academic year. We have emphasized many times this year that while exceptions are valuable to a unit’s growth when used judiciously, each one of them costs the college tuition dollars in the short-run. Through the use of the workload tracking tool we believe that we are promoting responsible use of these exceptions.

### **What can be done to improve the documentation and communication of formally assigned instructional workload?**

At minimum, there should be a written communication to each faculty member prior to the start of each academic year that documents the parameters of their teaching assignment for the academic year. This statement should include assigned courses, any co-teaching considerations and an explicit statement of any outside-the-classroom activities expected when assigned courses are less than what would be expected based on instructional FTE alone.

I have also emphasized in my discussions with Unit Heads the importance of transparency and consistency in the use of course releases (“exceptions” or “adjustments”). I’ve seen annual statements in some units that display who and why specific faculty are receiving course releases. Note that this is not the same thing as displaying FTE splits for each faculty member in the unit. Instead, I am suggesting that it seems reasonable for “exceptions” to the FTE split along the lines described above to be communicated to all faculty in the unit so as to promote awareness and confidence that such releases are being awarded in a fair and equitable manner. Effectively, this tells faculty how much the unit is investing each year in building and supporting programmatic infrastructure that will benefit the unit over time.

All of this would be good to discuss within each academic unit. We’ve tried to build a system that allows our topically diverse units to mold policy to best suit their specific unit needs, at the

same time ensuring faculty across the college of the boundaries and limits to their teaching workload assignments. I'm sure that there are nuances that deserve discussion between faculty and their Unit Head. I suggest making this discussion a priority early this spring.

If you believe that such communication or assignments are not happening in a fair and equitable manner within your unit, please don't hesitate to reach out to me.

It has been a tumultuous semester and I deeply appreciate all that you continue to do for our students in keeping them engaged and focused on the investment they are making in their future. I hope to see many of you at our CALES graduation convocation on Friday, Dec 15. And, to everyone, please have a restful winter break. We will be back at it in January.