

# Faculty Activity Reporting

Draft 12/20/23

*The following is presented as a possible University Policy and Procedure that uses Percentage of Effort Planning and Reporting as an infrastructure for workload decision making and intercampus resource analysis. It is intended to work with the existing CBA, Unit Standards, and external accreditation requirements. It builds upon the draft policy that was presenting in May 2023.*

## POLICY PROPOSAL

### PURPOSE

Academic Affairs will utilize a Faculty Activity Reporting system for planning, reporting, and assessing faculty workload at the unit, college, and campus levels.

### POLICY

Faculty Activity Reporting will allow Faculty and Academic Units to quantify the Percentage of Effort (POE) within a given faculty member's workload. POE refers to the proportional amount of faculty workload assigned to teaching, service, and research/creative scholarship (RCS) over academic year or fiscal year contract.

Per the Collective Bargaining Agreements of the UFA and MCFA faculty teaching workload is assigned by the deans.<sup>1</sup> POE is determined by deans in consultation with the unit chairs and faculty based on the needs of the unit when a faculty member is hired. Faculty recruitments must include possible POE informed by the instructional workload and unit standards of the hiring unit. Faculty on split assignment will have their POE proportionally split between the units as negotiated by the units in which they are evaluated.<sup>2</sup>

Deans may re-assign teaching workload in the form of equivalent credit.<sup>3</sup> Equivalent credit will be defined by the dean, subject to the approval of the provost. Teaching workload may also be bought-out by a faculty member using sponsored program funding at a negotiated rate of the faculty member's base pay.

Unit standards will define normal percentage of effort for faculty in that unit. Faculty POE for a given contract must equal 100% when distributed across teaching, service, and RCS. This does not supersede or replace POE reporting requirements for sponsored research, but it can inform those processes.

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<sup>1</sup> UFA and MCFA<sup>1</sup>, 6.210. "Deans are responsible for assigning faculty teaching workload, subject to the approval of the Provost, giving consideration to the recommendations of the department chair. The instructional portion of the workload shall be that deemed sufficient to meet programmatic needs as determined by the dean in consultation with unit faculty. While it is not expected that the teaching portion of workloads be identical within and among units, assignments must be made relative to the total activity of faculty (including research/scholarship/creative activity and service)."

<sup>2</sup> UFA CBA 10.220, Page 40

<sup>3</sup> Ibid. 9.110, Page 25. "for duties beyond or in lieu of normal classroom teaching, including, advising, thesis direction, large classroom enrollment, writing-intensive courses, committee service, administrative duties, lab supervision, and research."

## FACULTY ACTIVITY REPORTING PROCEDURE

### Calculating Instructional FTE

The process begins with determining the percentage of academic year workload that is devoted to teaching. "A full-time semester assignment will be comprised of 15 credits and/or credit equivalencies as determined by the dean and approved by the Provost. In classes which are team taught, class credit will be prorated by degree of responsibility. Credit equivalencies are in addition to class credit."<sup>4</sup> To determine instructional POE, the number of credit hours for each section of the following types of instruction for the contract year are totaled:

- Lectures
- Seminars
- Studios/Labs
- Online Courses
- Approved Instructional Credit Equivalencies (see the next section)

That number is then divided by 30 for the academic year. "In classes which are team taught, class credit will be prorated by degree of responsibility."<sup>5</sup>

### Equivalent Credit

Deans are responsible for determining equivalent credit for instructional workload in their college. They are encouraged to do so collaboratively to encourage uniformity and equity that will lead to interdisciplinary collaboration between faculty of different colleges. Some definitions may be set by external accreditation requirements. The definitions may include but are not limited to:<sup>6</sup>

- Multiple sections of the same course
- Courses with large enrollments
- Writing-intensive courses without a TA or grader
- Supervised clinical courses
- Field experiences and practicum
- Studio and shop courses
- Chairing masters and doctoral committees

The remaining effort will be distributed between research and creative scholarship and service depending on contract type and unit standards.

### Faculty Activity Planning and Reporting

Initial faculty POE for all appointment types is set at the time of hire. The total effort for each position must equal 100%, whether the faculty member is full-time or part-time. In other words, effort is not measured by 40-hour work weeks, but by the percentage of total work.

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<sup>4</sup> Ibid. 9.110, Page 25

<sup>5</sup> Ibid. 9.110, Page 25

Normal performance to fulfill POE in RCS is defined in Unit Standards. Normal performance to fulfill POE in service is also defined in Unit Standards. Common University service activities overseen by the Faculty Senate, the UFA, and MCFA may carry a recommended POE for service on standing committees under their purview with set workload expectations.<sup>7</sup>

Chairs<sup>8</sup> are responsible for tracking and planning faculty activity for all tenured, probationary, and non-tenurable faculty (.5 FTE and above) who hold a majority assignment in their unit. Faculty activity planning for individual faculty will align with their normal evaluation cycle as outlined in the CBA.

Planning will take place after December 15 when the chair has completed their recommendations outlined in CBA 10.250 as part of the evaluation cycle for the prior year(s). This will allow faculty to bring forward POE requests in conjunction with planning unit course schedules for the following academic year. Faculty who are exempt from evaluation may still request to engage in POE planning each year. Those on sabbatical or leave in the coming academic year are exempt.

Chairs will submit unit faculty activity reports to the dean's office for approval of instructional workload after February 15 when the dean has completed their recommendations outlined in CBA 10.260 as part of the evaluation cycle.

Deans must review and approve faculty activity reports for all units in their college. Any significant changes to instructional POE must be addressed in the course schedule before the start of advising and priority registration for the coming academic year.

Deans will prepare a college faculty activity report for the Office of the Provost by [Timing TBD, should be after the Provost has completed their evaluations], reporting the overall effort of the faculty in each unit of the college. This assessment will address:

- POE for each Faculty member sortable by unit, assignment type and funding source.
- POE average for each unit broken down by assignment type, and funding source including the overall unit average.
- POE average for the college broken down by assignment type, and funding source including the overall college average.
- POE average for RCS documenting the percentage contributed by all faculty supported on the general fund regardless of external funding expended.

## Changes to POE

Changes to a faculty member's established POE for a given cycle must be approved by the faculty member and affected unit/department head(s) and dean(s). Any dispute regarding POE will be resolved through the appeal of workload assignment procedure outlined in MCFA and UFA CBA 6.220.

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<sup>8</sup> Ibid. 16.200, "Bargaining Unit members who are appointed as chairperson or director of the units listed in CBA 10.120 shall be considered chairpersons for the purpose of this contract."

## APPENDIX I: POE Examples

The charts below present examples of how instructional workload, service, and research and creative scholarship (RCS) can be apportioned annually across various academic appointment types. POE specific to disciplinary best practices, research missions, and accreditation requirements will look different depending on the unit.

The following examples and associated credits presume faculty are on academic year contracts at 1.0 FTE.

### Tenurable Appointments

The following appointments are governed by the UFA and MCFA Collective Bargaining Agreements.

<b>Teaching Emphasis</b>	<b>Split Teaching Emphasis</b>	<b>Research Emphasis</b>	<b>Split Research Emphasis</b>
60-90% Teaching	50-40% Teaching Unit 1	30-40% Teaching	30-40% Teaching
	10-20% Teaching Unit 2	50% RCS	30% RCS Unit 1
5-20% RCS	20% RCS		20% RCS Unit 2
5-20% Service	10-20% Service	10-20% Service	10-20% Service

### Non-Tenurable Appointments

The definitions for the following appointments are found in University Policy 350.

<b>Lecturer</b>	<b>Adjunct</b>	<b>Research</b>	<b>Clinical</b>
80-95% Teaching	80-95% Teaching	80-95% Research	60-80% Teaching (Clinical Equivalency)
			10-20% RCS
5-20% Service	5-20% Service	5-20% Service	10-20% Service

## APPENDIX II: Split Assignment Template

This Letter of Assignment “LOA” is for a split assignment for Assistant Professor Jane Doe and UNIT ONE and UNIT TWO.

### SCOPE OF ACTIVITIES

1. FTE will be split 55:45 between UNIT ONE and UNIT TWO, with UNIT ONE as the primary evaluation unit for tenure.
2. Asst. Prof. Doe will be provided an office (describe the terms, additional lab or studio spaces, physical resources, and location(s) if applicable).
3. Workload and Percent of Effort (POE) expectations for Asst. Prof. Doe, considering her employment at 0.5 POE within UNIT ONE and 0.5 POE within UNIT TWO, are as follows:
  1. Teaching: Asst. Prof. Doe’s instructional assignments will be negotiated with the Dean of each College, in consultation with their respective chairs, proportionate to the POE assignment and in accordance with the instructional workload policy of each department.
  2. Service: Asst. Prof. Doe’s work in each department will be commensurate with percent appointment in each academic unit.
  3. Research: Support for Asst. Prof. Doe’s research, including but not limited to grant management, travel, and payroll, will be provided by UNIT ONE for projects residing in UNIT ONE and by UNIT TWO for UNIT TWO for projects residing in UNIT TWO.

For at least the next three (3) years (through DATE), all salary savings generated in excess of 40% AY effort will be made available to Asst. Prof. Doe.

- ii. Existing grants and the IDC arrangement will remain without alteration through the end of the grant(s).
- iii. Subsequent grants submitted by Asst. Prof. Doe’s through UNIT TWO shall be treated as any grant normally submitted in that academic unit, and grants submitted through UNIT ONE shall likewise be treated as any grant normally submitted in that academic unit.

This assignment is subject to all terms and conditions contained in the Collective Bargaining Unit and governed specifically by 10.220. The terms of this assignment are considered to be in force until such time there is a request by the Provost to consider further modification.

APPROVAL SIGNATURES REQUIRED by Deans of UNIT ONE and UNIT TWO, Provost, Vice President for Research and Creative Scholarship, and ACCEPTANCE SIGNATURE by the faculty member.