Faculty Senate Routing Form
(action/proposal attached)

I. Item Title: Faculty Workload

a) Brief Description: Revisions to Faculty Handbook Section 5.00 Instructional Responsibilities of the Faculty (attached)

b) Initiated by: Faculty Affairs Committee

II. Faculty Senate Action: ☑ approved ☐ not approved ☐ other date: ________

Comments: ________________________________________________________________
__________________________________________________________________________
___________________________________________________________
Vote: ☑ Voice Vote, Unanimous ☑ Voice Vote, Majority In Favor ☐ Electronic Clicker:
      25 Ayes 0 Nays 0 Abstentions 2 No Votes

FS Secretary signature: __________________________ date 7-11-14

III. Provost: ☐ for information ☐ Recognition of Receipt
              ☐ for action................. ☑ approved ☐ not approved

Comments: ________________________________________________________________
___________________________________________________________
Person responsible for Implementation:
Provost signature: __________________________ date 7/1/14

IV. Chancellor: ☐ for information ☑ Recognition of Receipt
                ☐ for action................. ☑ approved ☐ not approved

Comments: ________________________________________________________________
___________________________________________________________
Chancellor signature: __________________________ date 2/1/14

Once finalized copies will be returned to the Provost Office's representative who will scan and distribute electronically to:
Chancellor
Provost
Chair of Faculty Senate
Secretary of the Faculty Senate
Associate Vice Chancellor for Academic Affairs (for catalog and handbook)
Associate Dean of Graduate School (for catalog)
Others (i.e. person responsible for implementation)
Associate Dean's Council - Draft

[REF: APR 12: Faculty Load; 5.00 INSTRUCTIONAL RESPONSIBILITIES OF THE FACULTY (5.01 Teaching Load Policy-Members of the Faculty; & BOG policy 400.3.4)]

5.00 Instructional Responsibilities of the Faculty

5.01 Teaching Load Policy-Members of the Faculty (some sections under review)

I. Faculty Work Load Expectations

A. Academic Year

Professional Workload

During the academic year full-time faculty distribute their professional workload across teaching, scholarship, and service. Given the diversity of missions within the various academic units, annual professional workload may vary depending upon faculty, department, and college/school needs. However, the standards for tenure and promotion do not vary because of variations in professional workload.

Teaching Load

All campuses and constituent institutions will develop and implement policies and procedures to monitor faculty teaching loads and to approve significant or sustained variations from expected minimums (UNC Policy Manual 400.3.4).

Individual faculty teaching loads are best managed at the department and college/school level. Faculty teaching loads will be determined through consultation among faculty, department heads, and deans. Given the complexity of faculty professional work activities, teaching loads may vary from one faculty member to another and over the course of an academic year. Equivalency in load (for example, contact hours versus credit hour count), should be decided by the department/school head in consultation with the dean.

Standard Load

WCU adheres to the standard methodology for collecting data on teaching load as outlined in UNC Policy Manual 400.3.1. At WCU, this standard load may be affected (assignment of greater or fewer hours) by a number of factors, including types of classes taught, faculty appointment type, sizes of classes taught, and administrative or research duties. Reductions from the standard load must be approved by the Department Head and the Dean of the College of the faculty member.

Full Time Equivalency (FTE/SCH-Targets)
Demands and department heads must consider departmental and college level student-credit hour generated FTE targets as they assign individual faculty loads. Individual teaching assignments may result in student-credit hour generated FTE above or below the departmental target as long as departments and colleges meet their total respective target as set by the dean and provost, respectively. Each dean is responsible for implementing and documenting processes to monitor and approve loads that vary from the standard. Normally, department heads, with the approval of the dean, may reassign faculty from teaching to invest more of their time in scholarship, administrative duties or engaged service, but the student-credit hour generated FTE targets must be met in the aggregate.

Special Courses and Independent Studies

Especially intensive, individually oriented courses, independent study, laboratory courses, and graduate courses that contribute a heavy weighting to teaching load. Courses funded outside of the general fund (e.g., non-credit continuing education) may not be used as a part of the normal faculty teaching load. Courses that are not conducted in regularly scheduled class meetings, such as "readings," "special topics," "problems" or "research" courses, including dissertation research, and "individual lesson" courses also are excluded from the Teaching-Load calculation (BOG-policy 400.3.v).

Furthermore, to maximize instructional efficiency and protect faculty workloads, the number of undergraduate independent study courses a faculty member may be assigned as the primary instructor of record should be limited to no more than three (3) independent studies in any given semester. Exceptions to this limit will be reviewed and approved by the dean of the college in which the faculty resides.

Administrative Assignments and Load

Demanding administrative assignments such as department head, program director, or faculty fellow may result in reduced expectations for teaching. For example, a faculty member with an administrative assignment requiring time equivalent to teaching one class per semester may be assigned a reduced teaching load. Untenured faculty are less likely than tenured faculty to be given administrative assignments with such high expectations. Administrative assignments which are performed and compensated as "overload" will not result in reduced expectations in teaching, nor in scholarship or service. College deans will provide approval and oversight of the reassignments within their colleges.

According to the UNC Policy Manual (400.3.4), "criteria for course reductions will be grouped into the following reporting categories:"

- Course/curriculum development
- Heavy load-academic advising
- Accreditation/program review
- Technology training for instruction
- Co-curricular activities
- Academic administration
- Institutionally-supported research
- Institutional service
- Service to the public
- Service to the profession
- Off-campus scholarly assignment/on leave
g. Externally-funded research

m. Other

There inherently will be some variability in time expectations for scholarship and service of tenure-track faculty. For example, new tenure-track faculty initially may dedicate more time to scholarly activities than service as they adjust to their positions and establish their program of scholarship. In addition, there will likely be more flexibility and variability in work load distributions of tenured faculty, who tend to assume more demanding service and administrative roles and sometimes may curtail their scholarly activities, temporarily, to accommodate these roles. Fixed term-line faculty members are expected to engage in regular teaching and, depending on their contract, service and/or scholarship. Exact assignments of faculty workloads may vary in relation to disciplinary standards, class sizes, contact hours, and other factors. Committee work directly related to the teaching assignment also may be an expectation. Assignments which are performed and compensated as "overload" will not result in reduced expectations in faculty member's regular duties.

B. Summer Term

Teaching assignments are voluntary and not guaranteed for the summer sessions, and the need and opportunity for teaching assignments vary among the colleges. The summer term is divided into various parts. For guidelines concerning summer session faculty load please see APR 19: Guidelines for Summer Session at http://www.wcu.edu/19132.asp.

II. Overloads for Full-Time Faculty

Since faculty have scholarship and service responsibilities as well as teaching assignments, overloads should be assigned carefully so that faculty do not become over-extended and can meet their regular responsibilities.

The Provost's Office distinguishes between two types of overload: those funded out of the general fund and those funded through self-supported revenue courses through Educational Outreach. Regardless of type, faculty may teach a maximum of one course overload (3 credits) per semester with the approval of their dean. Overloads funded via Educational Outreach may be taught by faculty members of their election with the concurrence of the department head and dean. However, overloads funded via general funds shall be authorized only by the dean when it is impossible or impractical to hire part-time faculty because of last minute staffing problems due to emergencies or unexpected high enrollment. Deans shall notify the Provost's Office whenever they approve an overload funded by the general fund. The notification should include a brief explanation consistent with this policy. Overloads exceeding three hours will be approved only in the rarest circumstances. Overloads, and other exceptions to this policy, must be approved in advance by the Provost.