



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Instructional Workload

Business Manager Training Session

CAS Budget Team

October 29, 2020

College of Arts & Sciences
Synergy Unleashed

Agenda

- Process background
- Workloads
- System overview
- System demonstration
- Timeline

PROCESS BACKGROUND

Background and purpose of the instructional workload process

- Instructional workload (IWL) system originally launched in academic year 1999 following review of departmental workload policies
 - In January 2013, the Board of Governors codified the requirement to have a system to “monitor faculty teaching loads and to approve significant or sustained variations from expected minimums.” (UNC Policy Manual 400.3.4)
- IWL system serves as permanent record of teaching responsibilities for faculty and State-funded instructional staff
- Information collected in IWL system is also used for reporting during the University’s accreditation process

WORKLOADS

Faculty

- Standard workload for a tenured/tenure-track faculty member at a R1 university, like UNC-CH, is 2-2
 - Varies by department with more research intensive units having lower loads since lab work is essential part of graduate education in those fields
- Standard workload for a fixed-term teaching faculty member is 3-3

Graduate Students

- Workloads for graduates students vary by appointment type
 - Teaching Fellows: full responsibility for a course as instructor of record
 - Teaching Assistants: responsible for recitation or lab sections; number of total students should about 50-70
 - Instructional Assistant: assist faculty member with grading/prep for course with at least 50-70 students
- More information available in CAS Chairs' Manual, Budgets section

WORKLOADS

Funded Releases

(generate savings for the instructional budget)

- External administrative releases
 - Administrative appointments outside of the department; standard \$15K rate /course
- Research buy-outs
 - Typically for academic year effort on contracts and grants
 - Rates vary by department - CAS standards in Chairs' Manual, Appendix
 - Limited to 50% of course load per year unless approved by SAD
- Internal competitive leaves/External competitive leaves
 - From various funding opportunities with differing levels of support
- Various other funded releases are discussed in the Chairs' Manual, Appendix

WORKLOADS

Unfunded Releases

(do not generate savings for the instructional budget)

- Internal administrative releases
 - Administrative duties within the department (e.g. chair, associate chairs)
- Research and study assignment
 - Faculty eligible to apply for a one semester RSA every five years
 - Dean's Office gives department a RSA allocation each year
 - Employee's salary and funding sources do not change
- Faculty serious illness, major disability, and parental leave
 - Short term leaves where employee's salary and funding sources do not change

WORKLOADS

Funded OR Unfunded Releases

- Other professional leave
 - Employee's salary and funding source may or may not be altered depending on the specifics of the leave
- Personal leave
 - Faculty are eligible for various leaves, some with and some without pay
 - Specifics of leave type determines if the employee's salary and funding sources will be altered
 - Consult Academic Personnel/Office of Human Resources website or contact your Dean's Office HR consultant for more information

What counts towards faculty teaching loads

- In-load
 - Undergraduate and graduate courses and seminars
 - Triple I courses count towards the teaching load of all three faculty members
 - Cross-listed courses should only be counted in-load once
 - Include the section with higher enrollment
- Out-of-load
 - Research supervision, independent studies, thesis/dissertation advising
 - Friday Center courses, which are considered an overload

Working with Faculty in IWL

- Use the Perm/EPA Savings page to update faculty teaching loads
 - *Known Course Workload* and *Unit-added course workload* includes courses from ConnectCarolina and added by the manager associated with that instructor's normal teaching workload
 - *Non-Course Workload* includes information that impacts teaching workload, such as administrative appointments, research leaves, course release, etc
 - *Unassigned Courses* includes independent studies, theses, dissertations, and cross-listed sections

Working with Graduate Students in IWL

- Use Instr Spending page to update graduate student teaching loads
- FTE for graduate students in ConnectCarolina HR is typically .25 to represent hours worked per week
- FTE for graduate students in IWL should be 1 to represent a full work load for the academic year
 - Student held assistantship/fellowship in both Fall and Spring semester
- Dean's Office did not prescribe student FTE in IWL in past
 - Starting this year seeking consistent basis across departments to facilitate better reporting

IWL.OASIS.UNC.EDU

System demonstration



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TIMELINE

AY20 Process Timeline

- October 21: System opens
- October 29: Training session
- November 11: Deadline for department submission
- November 20: Deadline for chair review
- December 11: Deadline for SAD review

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Appendix: Where does the data come from?

- Permanent Faculty Salary: Dean's Office EPA database
- Leaves/Buyouts: Manual load from Dean's Office spreadsheet and leave database
- Instructional Spending:
 - Amount Paid: Actuals from Infoporte (program C1302)
 - Course Workload: Census Course database
- Chair Savings: Permanent stipends from Dean's Office EPA database
- Teacher of Record: Infoporte HR, Census Course database and Production Course database