Instructional Workload

Business Manager Training Session

CAS Budget Team
October 29, 2020
INSTRUCTIONAL WORKLOAD TRAINING SESSION

Agenda

• Process background
• Workloads
• System overview
• System demonstration
• Timeline
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
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

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
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
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
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
SYSTEM OVERVIEW

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
System demonstration
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
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