

Instructional Workload

Quick Reference Guide

The Instructional Workload (IWL) system serves as a tool for departments to validate that instructional activity is properly recorded and enables administrative certification of those activities. UNC System policy ([UNC Policy 400.3.4](#)) sets the requirement that system schools develop and implement policies and procedures to monitor faculty teaching loads and to approve significant or sustained variations from expected minimums. IWL has been redesigned to focus on tracking teaching loads and ensuring comprehensive system data.

Deadlines

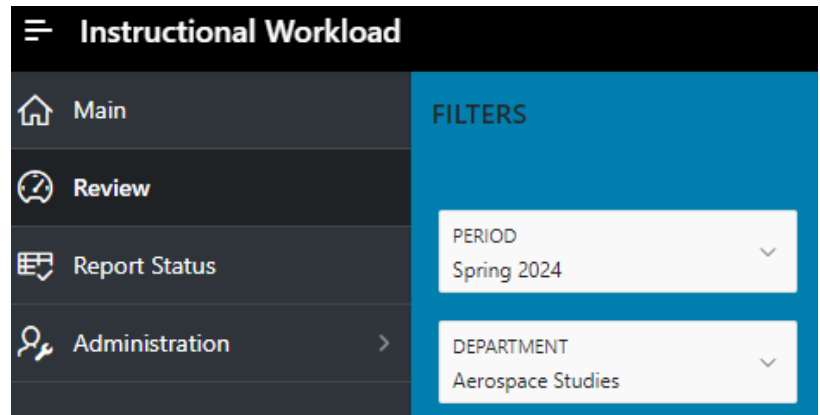
- Department Manager Submission: **Monday, February 26th, 2024**
- Chair Signoff (Department submission must be completed first): **Friday, March 1st, 2024**
- Budget Analyst Review: **Friday, March 8th, 2024**

These deadlines ensure that changes to course data can still occur in Connect Carolina for the current semester.

Navigation and Rules

System Site: <https://iwl.oasis.unc.edu/>

This academic year, IWL will be reviewed each semester, after census but before Connect Carolina closes for course changes. The semester and year you are working on will automatically be selected. Previous years' reports can be viewed by using the dropdown in the upper left. Other Filters on title are available on the left-hand side too if you only wish to see a subset of your assigned instructors.



The navigation menu on the left, which can be accessed by clicking the three line “hamburger” icon allows you to toggle between the “Main” page for data entry and the “Review” page for final reviews.

On the “Main” screen there is a scrollable summary of all your instructors by title. You can click on individuals to then have their details populate in tables below. Tenured/Tenure-Track faculty and Teaching-track faculty are assigned a minimum “Standard Teaching Load” based on their appointment and department. Adjunct, research, and clinical faculty, as well as Professors of the Practice do not have a minimum assigned due to their variable teaching responsibilities. Graduate students with teaching titles will require at least one assignment.

For faculty, courses pulled from Connect Carolina are categorized as either “Standard” or “Non-Standard”. Standard courses are typically lecture courses with regular meeting times that meet at least 100 minutes a week and have a minimum of 10 enrollments for undergraduate courses or 5 enrollments for graduate courses. While all courses are pulled in, “Standard” courses count towards meeting a faculty “Standard Teaching Load”, while “Non-Standard” courses do not (e.g., labs, independent studies, etc.). For students, any teaching assignment counts towards meeting their minimum workload, no matter what type of course.

The section for “Non-Course Workload” captures leaves, buyouts, administrative, and other releases. It comes pre-loaded with Dean’s office known leaves and administrative appointments, which are rounded up in the Fall semester. Pre-loaded releases can be corrected/adjusted. Non-course workload entries can count towards an instructor’s Standard Teaching Load.

Steps to Enter/Update IWL Information

Tenured/Tenure-Track faculty, Teaching faculty, and students must meet the minimum of their “Standard Teaching load” between “Standard” courses and/or Non-course Workload in order to submit the report. For the Fall semester, this means that a faculty must meet half of their annual teaching load. For those with an odd number of annual courses, the minimum required is half the annual amount, rounded down (e.g., 1 course for those with a 2:1 load). For Spring, the total annual courseload must be met between what was submitted in Fall and what is added in the Spring.

While all individuals should be reviewed, the system automatically highlights individuals who fall below standard teaching loads and these must be resolved in order to submit.

- T/TT Faculty, Teaching Faculty, and Other Faculty
 - Verify that the correct courses are assigned and that only courses that count towards Standard Teaching Load are included in that section. Unassign courses from Standard to Non-Standard when needed.
 - Non-Standard courses can be assigned to Standard but require a comment explanation (*with a minimum of 150 characters in order to provide adequate detail*).
 - New courses cannot be added in IWL. Please make any course changes in ConnectCarolina.
 - Enter leaves, buyouts, releases, or other reasons for lower workload. The number of courses must be entered for each semester, and some types of buyouts/releases require amounts to be entered to indicate salary savings (see FAQ table below).
 - Review automatically populated releases. *Possible releases are rounded up, so if the full number are not needed in a semester, please adjust the number and amounts down.*
 - All T/TT and Teaching Faculty individuals must meet or exceed their minimum teaching load through Standard courses plus entered non-course workload releases.
- Students
 - Ensure students are assigned to the correct courses for each semester. Generally, Teaching Fellows should be the Primary Instructor for a lecture section, while Teaching Assistants will be assigned to as a “TA” for a lecture course or potentially a “PI” for a lab or recitation.
 - The IWL system will not allow for you to add coursework for students. As with faculty, any changes must be made in ConnectCarolina.
 - Because IWL only pulls in students paid on teaching titles, all students listed must have at least one assignment to be able to submit the report.

Review, Submission and Approvals

After entry of the above on the “Main” sheet, navigate to the “Review” page by clicking the three line “hamburger” on the top left side. The Review page will give you the ability to view a summary of the information entered. If all instructors are meeting their workload minimums you can “Submit” the report. If the submit report button in the upper right is grayed out, please review the items listed in the note next to the button. If you scroll down the review page, you will also see highlighted rows where changes are needed. Navigate back to the “Main” page to make the necessary updates.

After the department manager submits the report, the department Chair will receive an email prompting them to review the submission. The Chair will default to the “Review” page. After reviewing the report, the chair

should click the “Chair Review” button in the upper right. The pop-up window will give the option to “approve the report” or “return it to the manager” for updates. In either case, the chair can add a comment. If it returns to the manager, the manager must go in, make necessary changes, then submit it for Chair Review again.

When the Chair approves the report, it will route to the unit’s assigned budget analyst (BA). The BA may reach out to the manager with questions or can recycle the report to the manager if updates are needed. Once the BA approves, the report routes to the division’s Senior Associate Dean for a final review and approval. The chair review and the SAD review are the critical steps to ensure compliance with [UNC System policy](#).

FAQs

A course that should count towards Standard Teaching Load is appearing in the Non-standard Teaching section. How can I move this course into the Standard Teaching Load section?

If a “Non-Standard” course(s) should count towards Standard teaching load, you can click on the horizontal lines next to the course and choose “assign”. Once you click save, this will move that course into the Standard section. In order to submit, you will need to add a written comment next to the re-assigned course that addresses issues around the course type, meeting times, and enrollment. The course will remain highlighted for subsequent leadership review. Standard courses can conversely be “unassigned” if needed.

How can I add a course assignment? When will it show in IWL?

For all instructors, all changes must be made in ConnectCarolina. Changes made in ConnectCarolina will appear in Instructional Workload the following day.

An adjunct faculty member in my department is not appearing – how can I add them?

Only adjunct faculty with a course assigned in ConnectCarolina will appear in the system. If you notice someone missing, please add them to a course in ConnectCarolina.

How do cross-listed courses appear?

The section with the larger enrollment will be included in the Standard Teaching Load and other sections will appear under Non-standard Teaching Load to avoid double counting.

Should assignments be different for Teaching Assistants vs Teaching Fellows?

Graduate Teaching Fellows are responsible for a full lecture course as the instructor of record. These students should be assigned as the primary instructor on a lecture course. Graduate Teaching Assistants can serve as recitation/lab instructors, assist faculty with large lecture courses, or various other types of instructional assignments. Accurate assignments should be added in Connect Carolina.

When I go to the review page, I cannot click the “submit report” button – what’s wrong?

Tenured/tenure-track faculty, teaching faculty, and students must meet or exceed the minimum standard workload between Standard Teaching Load and Non-course Workload. All students must have at least one assignment. On the review page, scroll down to look for highlighted lines to identify the outstanding issues. You should be able to submit once these are resolved.

What happens if someone in the review chain returns the report?

If the report is returned at any stage, it is recycled to the manager for updates. The manager will receive an email notifying them to make updates. After resubmitting, the report must flow through all review steps again.

What are the types of Non-course Workload you can enter?

Type	Detail	Requires Amount	Requires Description
Research Buyouts	Funded course buyouts to conduct research, typically from grants	Yes	Yes
New Hire/Promotion	Funded course buyout due to a hiring or promotional agreement	Yes	Yes
External Competitive Leaves	Funded prestigious research leaves from outside entities	Yes	Yes
Internal Competitive Leaves	Prestigious, funded, research leaves from internal entities	Yes	Yes
Professional Leave without Pay	Salary reduction to conduct work for an outside entity	Yes	Yes
Personal Leave without Pay	Salary reduction to take a personal leave	Yes	Yes
Funded Administrative Assignment	Administrative role that takes the place of instructional work	Yes	Yes
Research and Study Assignment	Internal release from teaching duties without salary reduction	No	Yes
Professional Leave with Pay	Faculty taking leave to work for an outside entity without salary reduction	No	Yes
Personal Leave with Pay	Medical, parental, FMLA, and other personal leaves without a salary reduction	No	Yes
Part-time FTE Reduction	Override to reduce teaching load for less than full FTE	No	Yes
Department Discretionary	Unfunded departmental administrative assignments and other departmentally granted releases	No	Yes
Other Instructional Activity	Captures instructional activity not shown in standard or non-standard courses.	No	Yes

What sub-types are available for Department Discretionary Releases?

Sub-Type	Detail
Asst/Assoc Chair	Unfunded release given to accommodate workload for internal Assistant or Associate department chair appointments
New Hire/Promotion	Unfunded release given as part of a hiring or promotion agreement
Program Director	Unfunded release for a program director
Language Coordinator	Unfunded release for a language coordinator
DUS/DGS	Unfunded release for a DUS/DGS position
Saved/Banked Release	Unfunded release based on excess teaching activity in another semester
Other	Unfunded release for purposes not listed above


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Contacts for Help

Access to IWL and various roles is controlled through the [Common Authorization Tool](#). If you have access or CAT questions, please reach out to Joy Montemorano (jmonte@email.unc.edu).

Division	Analyst Name	Email
Fine Arts and Humanities	Charu Gunachandran	charu@live.unc.edu
Natural Sciences	Lindsay Gangl	imgangl@unc.edu
Social Sciences	Heather Yousef	hyousef@unc.edu
Undergraduate Education	Katrina White	katrina_white@unc.edu
Other/General	Joe Daley/Elizabeth Bakanic	jjdaley@unc.edu ; bakanic@unc.edu