

ARTICLE [x]. WORKLOAD AND OVERLOAD COMPENSATION

Section 1. Definition of Full-Time Faculty Workload

The primary responsibilities of all faculty members are teaching, professional development, and service. Teaching encompasses lectures and labs as well as activities such as working with students outside of class, posting and maintaining appropriate office hours, course and curriculum planning, and like activities. Professional development includes maintaining currency in the discipline taught as well as other research appropriate to the faculty member's expertise and appointment. Service includes departmental and institutional committee work, student support and retention activities, and service in professional organizations or other professionally-related public service.

To encourage excellence in and balance between teaching, service, and professional development, instructional and non-instructional workload must be clearly codified while leaving room for program- and department-specific needs as determined by department chairs.

Faculty members on nine-month (9-mo) appointments have a 396-week appointment period. They are not hourly employees, but their assignments shall be structured in such a manner that it is reasonable for a competent individual to fulfill the minimum requirements needed for reappointment, promotion and tenure over the full 396-week appointment period. The nature of faculty work prevents one from evenly spreading out the time commitment across the year. Some weeks will entail more time than a standard workweek; some weeks will entail less. ~~When classes are not in session, a faculty member must be able to take advantage of the reduced demands to focus on course preparation, professional development, and scholarship.~~

Contractual work done ~~beyond that outside~~ of a 9-month contract should be calculated on a pro-rated basis consistent with this article. This applies to faculty with contracts between 9 and 12 months.

Full-time faculty workload is defined as 36 workload units (WLU) for both tenured/tenure-track (TT) faculty and non-tenure-track (NTT) faculty on 9-month/396-week contracts and regardless of modality or campus location. Those 36 WLU shall encompass both instructional and non-instructional work.

Department chairs, in consultation with faculty, shall determine how workload is assigned to faculty each academic year or, as needed, each term. As part of this, if a chair determines that a faculty member needs to spend more time on non-instructional work scholarship, research, professional development and internal service to the University and external service to their profession and community consistent with the University's mission—~~whether service or professional development~~—in a given term or academic year, the chair will work with the faculty member to fairly determine what that non-instructional work should look like and how it will be quantified. However, no faculty member will be required to work beyond their annual contractual 36 WLUs, and if additional funding is needed to either compensate faculty for overload instructional or non-instructional work or to hire additional full-time or contingent faculty in a given term or academic year, the Employer shall provide that funding.

Section 2. Workload Minima for **Non Tenure Track Faculty**, Tenure-Track and Tenured Faculty

Workload ~~ranges~~ ~~minima~~ are guarantees to both a faculty member and a department. While departments may differ in how much their faculty spend on different aspects of workload, all faculty across the university will share the workload ~~minima~~~~ranges~~, according to their type of appointment. ~~Bargaining unit~~ faculty with heavy instructional workloads shall be guaranteed time for service and professional development, which are necessary for tenure and promotion; ~~similarly, faculty with heavy non-instructional workloads shall be guaranteed to spend the majority of their time on instruction, in keeping with the character of Oregon Tech as a teaching institution.~~

The following workload ~~ranges~~ ~~minima~~ are mandatory for ~~non-tenure track faculty~~, tenure-track and tenured faculty:

Instruction or Librarianship — at least 60% per academic year

Service Duties — at least 10% per academic year

Professional Development — at least 10% per academic year

[Instruction or Librarianship: 27-33 Workload Units \(WLU\) per academic year](#)

[Non-Instructional Service & Professional Development: 3-9 \(WLU\) per academic year](#)

[Non-Instructional workload shall always include at least 1.0 WLU for service and at least 1.0 WLU for professional development.](#)

Exact apportioning of ~~the remainder of faculty time~~ [workload](#) will be determined at the departmental level according to departmental needs; this will be agreed upon by both the department chair and the individual [bargaining unit](#) faculty member. ~~(For example, if a department has high service needs one year, a tenure-line faculty member may do up to 10.6 WLU (30% of total workload) of service that year while still doing 21.6 WLU (60% of total workload) of instruction and 3.6 WLU (10% of total workload) of professional development. Similarly, if a department has higher instructional needs one year, a faculty member may do up to 28.8 WLU (80% of total workload) of instruction while still fulfilling the minimum 3.6 WLU (10% of total workload) each in service and professional development.)~~

Section 3. Workload Minima for ~~Non-Tenure-Track Faculty~~

The following workload minima are mandatory for ~~non-tenure-track faculty~~:

Instruction or Librarianship — at least 80% per academic year

Service Duties — at least 5% per academic year

Professional Development — at least 5% per academic year

~~Again, exact apportioning of the remainder of faculty time will be determined at the departmental level according to departmental needs; this will be agreed upon by both the department chair and the individual faculty member. The NTF faculty member could do up to an additional 3.6 WLU of instruction, service, or professional development.~~

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97 **Section 3.4. Formulae for Quantifying Instructional Workload**

98 In recognition that all faculty have expert knowledge and, as such, faculty instruction is equally
99 valuable across disciplines, instructional workload shall be quantified according to the following
100 guidelines for all course prefixes and independent of enrollment:

101

102 1 lecture contact hour = 1 workload unit (1 WLU)

103

3 lab contact hours = 2 workload units (2 WLU)

104

105 These formulae assume that instructional workload includes both in-class and out-of-class time at a
106 ratio of 1:4, where 1 lecture hour (50 mins) requires, on average, three hours of preparation time (to
107 include both lecture preparation and grading) and one hour (to include both student contact time,
108 virtual or in-person, and sundry instructionally-related email tasks). For example, 9 WLUs of
109 instruction requires approximately 36 hours of labor in a work week. (However, as noted above,
110 some work weeks may require more time and some may require less time; faculty are not hourly
111 employees, and this contract assumes that these variations work themselves out over the course of
112 an academic term.)

113

114 Department chairs may make decisions about offering classes based on enrollment, but enrollment
115 shall not affect a faculty member's workload. Faculty members shall not be penalized for teaching
116 essential courses that advance students toward graduation; if a course is judged essential to offer, a
117 faculty member shall receive the same amount of instructional workload regardless of enrollment.

118

119 Librarianship

120 In recognition that Library faculty workload is unpredictable and inconsistent, Librarianship (as
121 equivalent to instructional workload) cannot be mapped to lecture hours but instead may include
122 some or all of the following activities: Fostering learning environments that promote information
123 competencies, inquiry and analysis, and critical thinking while encouraging lifelong learning;
124 contributing to the design, improvement, and assessment of courses, curricula, and research
125 activities; managing, developing, and creating the libraries' collections, as well as facilitating
126 intellectual and physical access to the libraries' collections that foster diverse perspectives.

127

128 Externship

129 For an in-load externship assignment, faculty shall receive 1-1 credit hours to workload unit basis.

130

131 Summer/Off-Term

132 Instructional workload assigned during the Summer (or "off" term) faculty shall receive a percent
133 equivalent to their annual base salary: salary divided by total annual WLU = pay per workload unit
134 (WLU).

135

136 **Section 4.5. Formula for Quantifying Non-Instructional Workload**

137 Non-instructional workload, including scholarship, research, professional development and internal
138 service to the university and external service to their profession and community consistent with the
139 university's mission, both service and professional development, shall be quantified according to the
140 following formula:

141
142 10 hours of non-instructional work = 1 workload unit

143
144 Quantifying Service

145 For service duties whose work occurs primarily in meetings, workload shall be calculated based on
146 approximate meeting hours per year. For service duties whose work occurs primarily outside of
147 meetings, workload shall be calculated based on approximate hours of work per year. In either case,
148 WLU correspond to the non-instructional workload formula above, where 10 hours of non-
149 instructional work = 1 WLU.

150 Additionally, in recognition that chairing a committee creates additional workload, chairing a
151 committee shall count as an additional 0.1 WLU per meeting (that is, an extra hour of work for
152 every meeting).

153
154 To ensure institutional equity in workload assignments, major university-wide service shall be
155 divided into three categories: high-commitment service (> 20 hours per year), mid-commitment
156 service (10-20 hours per year), low-commitment service (< 10 hours per year).

157
158 In addition to major university-side service, other non-instructional duties as assigned by a
159 department and according to departmental needs shall be calculated according to the non-
160 instructional workload formula. Department chairs shall justify their classification of departmental
161 service workload in their annual workload reports. This list shall be revisited each June by
162 departments and OT-AAUP.

163
164 Student advising workload ~~shall be capped at 50 advisees per faculty member and~~ shall follow the
165 non-instructional workload formula, where 10 hours of work = 1 WLU. That formula shall be
166 applied specifically to advising in the following way.

167
168 < 10 students = not quantified
169 ~~11-20 students = 0.5 WLU/quarter~~
170 ~~21-30 students = 1.0 WLU/quarter~~
171 ~~31-40 students = 1.5 WLU/quarter~~
172 ~~41-50 students = 2.0 WLU/quarter~~
173 ~~2-154 students = 0.25 WLU~~ not quantified
174 155-29 students = 0.5 WLU/quarter
175 30-40 students = 1.0 WLU/quarter
176 41-50 students = 1.5 WLU/quarter
177 >50 students = 2.0 WLU/quarter

178
179 Service work in the form of program director shall receive a minimum of 3 WLU per term. Other
180 departmental service such as scheduling, program assessment, retention and recruitment
181 coordinator, shall receive commensurate recognition of work according to the workload formula in
182 this section.

183
184 Quantifying Professional Development.

185 In recognition of the disciplinary expertise of individual departments, professional development
186 shall be quantified at the departmental level in accordance with the non-instructional workload
187 formula. For example, a department may determine that presenting at a regional conference is worth
188 .5 WLUs while presenting at a national conference as worth 2 WLUs, etc. Such determinations shall

189 be justified in both the annual Faculty Objectives Plan and in the department's annual workload
190 reports.

191

192 **Section 5.6. Commitment to Maintaining Full FTE**

193 In the event of course cancellation for insufficient enrollment, the University will work with the affected
194 faculty member to determine if it is possible to replace the course assignment with an equivalent course
195 assignment within the same appointment period and academic year.

196 If it is not possible to replace the course assignment within the same ~~appointment period~~ and academic year,
197 the department may provide an equivalent, alternative non-instructional assignment consistent with the
198 department's workload ~~policy~~ needs. Examples of such work include but are not limited to the following:
199 advising; determining course equivalencies for transfer credit; assessment projects; curriculum development;
200 recruiting. The equivalent, alternative assignment must be assigned and realistically completed during the
201 same term the cancelled course was scheduled.

202

203 **Section 6.7. Overload and Overload Compensation**

204 Any work—instructional or non-instructional—performed by faculty members beyond their 36
205 WLU full-time workload shall be considered overload. In recognition that overload work is work
206 outside of a faculty member's regular annual contract, performing instructional or non-instructional
207 work outside of 36 WLUs (i.e., workload of 37 WLUs or above) shall never be mandatory and shall
208 always be compensated. To maintain departmental flexibility with workload assignments, overload
209 shall be formally calculated at the end of spring term and paid on June 30th. The June 30th overload
210 will be added to the faculty salary calculation for retirement benefits.

211

212 Overload shall be compensated per WLU at 1.5 times the bargaining unit member's annual base
213 salary, as determined by the following workload overload formula:

214

215 $\text{Salary divided by total annual WLU} = \text{pay per workload unit (WLU)}$

216 e.g. 9-month salary divided by 36 = pay per workload unit (WLU)

217 12-month salary divided by 48 = pay per workload unit (WLU)

218

219 Example A:

220 9-month salary (\$54,000) divided by 36 = \$1500.00/WLU

221 \$1500/WLU x 1.5 = \$2250/WLU (overload pay per WLU)

222

223 Example A Overload Compensation:

224 6 WLU x \$2250/WLU = \$13500

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226 Example B:

227 9-month salary \$72000/36 WLU = \$2000/WLU

228 \$2000 WLU x 1.5 = \$3000/WLU (overload pay per WLU)

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230 Example B Overload Compensation:

231 6 WLU x \$3000/WLU = \$18000

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233 No faculty member shall be forced to take on overload work; overload must always be voluntary.

234 Overload shall be distributed in such ways that faculty shall have equal opportunities to fulfill

235 responsibilities needed for tenure and/or promotion, and instructional and non-instructional

236 workload should not disadvantage faculty members' promotion and/or tenure process (e.g., faculty
237 who are deficient in non-instructional criteria should not be encouraged to overload in instructional
238 workload, etc.).

239
240 Externship overload shall be calculated according to the following formula: \$60 per student-basis
241 per credit hour.

242
243 Hybrid or online courses shall be loaded equivalently to face-to-face/traditionally delivered courses.
244 All other loading procedures in this Article shall apply.

245
246 **Section 7.8. Determination of Course Caps**
247 Course caps (maximum number of students) shall be determined in consultation with departmental
248 faculty, and these caps shall be based primarily on established disciplinary and pedagogical best
249 practices. Course caps shall be clearly communicated to bargaining unit members at least at the time
250 of course scheduling or earlier, whenever possible.

251
252 A course can only be over-enrolled with the explicit voluntary consent of the faculty, in exceptional
253 circumstances, and compensated at pro-rated workload units (for example, a course loaded as a 3
254 WLU with an established cap of 20 students, shall be loaded as a 6 WLU course if a faculty agrees to
255 teach the course with 40 students in it).

256 **Section 8. Student Consultation Hours**

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259 (A). All bargaining unit members shall be available for student consultation. Student consultation
260 sessions, student contacts and communication are a necessary part of teaching a course. Full-time
261 bargaining unit members shall establish and maintain a minimum of five (5) scheduled or by
262 appointment student consultation hours per week outside of class, each term they are teaching.
263 Those bargaining unit members with less than full-time appointments shall establish minimum
264 consultation hours in proportion to their part-time appointment.

265
266 (B). Each bargaining unit member shall include consultation hours on each course syllabus. Upon
267 request bargaining unit members shall report consultation hours to administrative supervisor

268 **For the Article on Definitions:**

269 **Academic Year.** Academic year shall consist of three (3) 10 week terms. For nine (9) -month
270 faculty the academic year shall consist of three (3) 10 week terms beginning on or about September
271 15th including a Convocation before the beginning of the fall classes but not including scheduled
272 holidays, Thanksgiving Break, Winter Break and Spring Break, as defined by the current academic
273 calendar. The academic year will end on or about June 15th. For twelve (12) -month faculty the
274 work year shall consist of twelve (12) months but not including scheduled holidays. Accrued
275 vacation leave shall be used for any break between terms.

276 **Summer Term.** Summer Term is the time that occurs between the end of the spring term on or
277 about June 15th and the start of the fall term on or about September 15th.

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