**Workload Policy**

**College of Business  
University of Texas at Arlington**

September 25, 2019

**Preamble**

In November 2017, the Board of Regents of the University of Texas System adopted a policy governing faculty workload and reporting requirements. Rule 31006 of *Regents’ Rules and Regulations*, requires that each academic institution establish a workload policy that sets forth equitable and fair guidelines that permit units to best deploy faculty to foster student success and advance the unit’s mission (see Appendix A). This regental workload policy mandates that institutions:

* Recognize classroom teaching, basic and applied research, service, and professional development as important elements of faculty workload, and
* Give appropriate weight to each activity in determining faculty workload credit.

Concurrently, the U. T. System Faculty Advisory Council, in consultation with the system Office of Academic Affairs, adopted and submitted guidelines for the development and approval of unit workload and reporting policies (see Appendix B). These guidelines indicate that local units, such as departments or schools, should develop workload policies tailored to their respective circumstances that are aligned with college and university workload policies.

In response to these developments, in March 2018, Provost Teik C. Lim formed a taskforce to draft the university’s workload policy. The taskforce completed its work in December 2018 and submitted a draft policy to the U. T. System for review and approval. In January 2019, the university received notice of approval from the U. T. System. The final university workload policy is presented in Appendix C.

After receiving approval of the university workload policy, each U. T. Arlington college and school began the process of drafting and finalizing a workload policy tailored to the unit’s circumstances. In the College of Business, this process began with the formation of a committee in March 2019. The college committee completed its work in August 2019.

**Introduction**

This document sets forth College of Business policy regarding faculty workload assignments and reporting for all full-time faculty members: tenure-track and nontenure-track. The guidelines specified herein are designed to achieve the following objectives:

* Ensure that college instructional obligations are met,
* Promote student success,
* Advance the college’s mission (see Appendix D), and
* Secure an equitable and fair assignment of faculty work effort.

In accordance with *Regents’ Rule* 31006, workload credit (**WLC**) is recognized for teaching, basic and applied research, service, and professional development. Workload credit is also recognized for administrative work.

This assignment and reporting process: (1) considers all university-related activities undertaken by a faculty member during the fall and spring semesters and (2) excludes activities that are separately compensated.

This remainder of this policy statement is divided into two sections. The first section sets forth expectations regarding the normal workload of full-time faculty members. The second section sets forth rules for reporting workload activities. The college dean or his designee is responsible for faithfully implementing this workload policy.

This policy statement is effective September 1, 2019.

Approved by unanimous consent of the ad hoc COB Workload Committee:

Greg Frazier *ex oficio*

George Benson – Chair

Bill Crowder

Mark Eakin

Tom Hall

Grace Hao

Ann McFadyen

Michael Richarme

**Workload Assignment Expectations**

***General Policy***

To advance the college’s mission, every full-time faculty member is assigned a set of workload activities. Individual workload assignments are determined by the department chair in consultation with each faculty member on an annual basis. Faculty workload is negotiated yearly and is subject to needs of the department/college and the dean’s approval. Typical considerations include budget factors, course rotation/programmatic needs, and student success initiatives. Depending on their nature, workload assignments earn varied workload credits (**WLC**).

The normal minimum workload expectation for full-time faculty members is 30 **WLC** for the fall and spring semesters combined. Assignments undertaken in the summer and tasks which are separately compensated (e.g., teaching in an executive MBA program) are excluded. College workload expectations are summarized in Table 1.

|  |  |
| --- | --- |
| **Table 1**  **WLC Requirement for Full-Time Faculty Members** | |
| **Faculty Category** | **Expected WLC Assignment\*** |
|  |  |
| Tenured (**T**) | 30 credits |
| Tenure-track (**TT**) | 30 credits |
| Nontenure-track (**NTT**) | 30 credits |
|  |  |
| \* - Does not include summer assignments or tasks which are   compensated separately. | |

Due to the varied nature of college and departmental needs, it is infeasible to ensure that assigned workloads equate to exactly 30 **WLC** and it is expected thatthe workload of a full-time faculty member will vary year to year. If a faculty member’s workload is 36 WLC or higher, the Department Chair and Dean should endeavor to adjust assignments to bring **WLC** down while meeting the needs of the department/college. Adjustments may include changes in the faculty member’s teaching assignments, service expectations, research expectations, or a combination of these assignments.

Workload assignments are divided between teaching, research, service, and administration. A typical allocation of workload assignments for tenured (**T**) faculty members is 40% teaching (12.0 **WLC**), 40% research (12.0 **WLC**), 20% service (6.0 **WLC**), and 0% administration. Tenure-track (**TT**) faculty members who are not yet tenured will normally have a workload distribution of 40% teaching (12 **WLC**), 50% research (15 **WLC**), 10% service (3.0 **WLC**), and 0% administration. For nontenure-track (**NTT**) faculty members, a typical allocation of workload assignments is 80% teaching (24.0 **WLC**), 0% research, and 20% service (6.0 **WLC**), and 0% administration or 100% teaching (30.0 **WLC**). Distributions may vary across faculty members and from year-to-year.

Faculty members assigned an above average workload in one area are typically assigned lower workloads in other areas. **NTT** faculty who are research active may receive reduced teaching or service workload assignments. Faculty members with administrative assignments are normally assigned reduced teaching responsibilities.

As required by *Regents’ Rule* 31006 and university policy, professional development activities undertaken by faculty members are taken into consideration when making workload assignments and reporting workload activities. Professional development activities may relate to any workload area (teaching, research, service, or administration).

***Instructional Assignments***

Faculty members who are untenured but on the tenure track (**TT**) will normally be assigned to instruct the equivalent of four (4) regular course sections (3 semester hours each) per academic year. This will typically be assigned as a 2-2 teaching load (2 courses per Fall and Spring semester). Department Chairs should make reasonable effort to limit the course preparations for **TT** faculty members to three or less preparations per academic year.

Tenured (**T**) faculty members with high (e.g., significant) or medium (e.g., recognizable) research activity will normally be assigned to instruct the equivalent of four (4) regular course sections (3 semester hours each) per academic year. Tenured (**T)** faculty members with low (e.g., minimal) research activity may be assigned increased instructional or service tasks. However, instructional assignments should not exceed eight (8) regular course sections per academic year. The level of research activity that qualifies for different teaching loads will be decided jointly by the Department Chair and Dean. Generally, instructional assignments should be divided equally between the fall and spring semesters. Department Chairs should make reasonable effort to limit the course preparations for **T** faculty members to three or less preparations per academic year.

Nontenure-Track (**NTT**) faculty members with meaningful service assignments will normally be assigned to instruct the equivalent of eight (8) regular course sections (3 semester hours each) per academic year. **NTT** faculty members who perform only instructional duties will normally be assigned to instruct the equivalent of ten (10) regular course sections (3 semester hours each) per academic year. Certain **NTT** faculty members may be hired with significant research, administrative (e.g. Program Directors) or service expectations and assigned to instruct the equivalent of six (6) or seven (7) regular course sections (3 semester hours each) per academic year. Department Chairs should make reasonable effort to limit the course preparations for **NTT** faculty members to three or less preparations per academic year.

***Research Assignments***

All **T** and **TT** faculty are expected to participate in research activities (basic and applied). Typically, **T** and **TT** faculty members should spend approximately 40% of their time on research. Faculty members with administrative assignments, above average instructional assignments, or above average service assignments will normally spend less time on research duties. Faculty members with below average instructional assignments or below average service assignments are expected to spend more time on research duties.

***Service Assignments***

All full-time faculty members are expected to perform routine service activities for the university and/or for their profession. **TT** faculty members are expected to spend approximately 10% of their time on service. **T** or **NTT** faculty member are expected to spend approximately 20% of their time on service. Faculty members assigned service duties requiring significantly more than normal work effort may be assigned reduced instructional or research duties.

The Department Chair should allocate service assignments equitably across faculty. While the Chair should consider faculty preferences, university service is necessary and the Chair has the authority to assign faculty to service duties (for example, serving on committees or serving as internship coordinator).

***Administrative Assignments***

Some faculty members are assigned part-time administrative duties. This includes work as a department chair, assistant chair, program advisor, Ph.D. area coordinator, or internship coordinator. Faculty members assigned administrative duties are typically assigned reduced instructional, research, or service duties.

**Workload Reporting**

***Instructional Activities***

The mission of the college includes high-quality instruction. Consistent with this mission objective, instructional activities that earn **WLC** include the following:

1. Serving as the instructor of a regularly scheduled undergraduate or graduate course.
2. Serving as the instructor of a combined (cross-listed) class.
3. Serving as the instructor of an undergraduate or graduate independent study course.
4. Serving as the supervisor of an undergraduate or graduate internship course.
5. Serving as the supervisor of a master’s thesis or doctoral dissertation course (thesis chair or dissertation chair).
6. Serving as the instructional coordinator of a multi-section course offering.
7. Developing a new course or new course format (regular vs. online).

**WLC** credit for regularly scheduled courses are based solely on course enrollment and type of class (undergraduate or graduate). **WLC** do not consider a variety of other factors. These other factors are given appropriate consideration in annual performance evaluations and include:

* Results of student evaluations and related grade distributions.
* The effort required for routine course preparation including: (1) revision of content and materials, (2) professional development undertaken to acquire or update instructional expertise, (3) learning management system tasks related to Canvas, and (4) recruitment of outside speakers.
* The effort required to service students including: (1) grading assignments, examinations, and papers, (2) meeting outside of class, (3) responding to inquiries via e-mail, phone, or text, (4) arranging for disability accommodations as required by university policy, and (5) supervising field trips and other off-campus course activities.

*Regularly Scheduled Course****s***

Serving as the instructor of a regularly scheduled three-semester-hour (3) course that is not a new preparation earns 1 **WLC** per credit hour for an undergraduate course and 1.5 **WLC** per credit hour for a graduate course. To account for the additional work effort needed to instruct larger classes, **WLC** are increased by the following multipliers:

Class Size Multiplier

0 to 59 students: 1.00

60 to 99 students: 1.25

100 or more students: 1.50

*Combined Classes*

Combined (cross-listed) classes consist of one regularly scheduled undergraduate course section and one regularly scheduled graduate course section. When a combined class is offered, the simultaneous teaching of two course sections yields a reduction in the faculty member’s total work effort compared to teaching two courses which are not combined. In normal circumstances, teaching a combined class reduces the faculty member’s classroom time, but does not reduce the work effort related to preparation or student servicing.

For combined classes, **WLC** are determined by the effort for preparation and student servicing. Class size is based on the combined enrollment of the two course sections and course level is determined by the highest-level course section taught.

*Independent Study Courses*

An independent study course provides students with the opportunity to work one-on-one with a faculty member. Serving as the instructor of an independent study course earns **WLC** which vary with the course level (undergraduate or graduate), student enrollment, and the credit hours each student earns upon course completion. Teaching an undergraduate independent study course earns 0.10 **WLC** for each student-semester credit hour. Teaching a graduate independent study course earns 0.20 **WLC** for each student-semester credit hour. The maximum WLC for independent study course regardless of the number of students is 3.0 for an undergrad course and 4.5 for a graduate course. A faculty member may not earn WLC in circumstances where the student (students) in question is (are) inactive and the faculty member does not devote significant work effort to the course.

As an example, teaching a 3-credit-hour undergraduate independent study course with 2 students enrolled would earn 0.60 **WLC** (3 x 0.10 x 2). Teaching a 3-credit-hour graduate independent study course with 4 students enrolled would earn 2.40 **WLC** (3 x 0.20 x 4).

*Internship Courses*

Serving as the supervisor of an internship course earns **WLC** which vary with the course level (undergraduate or graduate), student enrollment, and the credit hours each student earns upon course completion. Supervising an undergraduate internship course earns 0.084 **WLC** for each student-semester credit hour, limited to a maximum of 3 **WLC** for a given undergraduate course section. Supervising a graduate internship course earns 0.125 **WLC** for each student-semester credit hour, limited to a maximum of 4.5 **WLC** for a given graduate course section.

As an example, supervising a 3-credit-hour undergraduate internship course with 5 students enrolled would earn 1.26 **WLC** (3 x 0.084 x 5). Supervising a 3-credit-hour graduate internship course with 6 students enrolled would earn 2.25 **WLC** (3 x 0.125 x 6).

*Supervision of Master’s Theses and Doctoral Dissertations*

Serving as the supervisor of a master’s thesis course earns 0.167 **WLC** for each student-semester credit hour. Serving as the supervisor of a Ph.D. dissertation research course earns 0.334 **WLC** for each student-semester credit hour. The total (cumulative) **WLC** earned via supervision of a given student’s thesis or dissertation is limited to a maximum of 6.0 **WLC**. Only the chair of a thesis or dissertation committee can earn **WLC**. On projects with co-chairs, each co-chair receives one-half the **WLC**. A faculty member may not earn WLC in circumstances where the student in question is inactive and the faculty member does not devote significant work effort to the supervision task.

As an example, supervising a 6-credit-hour thesis course with 1 student enrolled would earn 1.00 **WLC** (6 x 0.167 x 1). Supervising a 9-credit-hour dissertation course with 2 students enrolled would earn 6.01 **WLC** (9 x 0.334 x 2). These examples presume the faculty member devotes significant work effort to the supervision process during the semester.

*Coordinating a Multi-Section Course*

Serving as the coordinator of a multi-section course earns 1.0 **WLC** per semester/session. As an example, coordinating multiple sections of a sophomore-level course during the fall semester and spring session would earn 2.0 **WLC**.

*New Course Development*

At the recommendation of the Department Chair and with the Dean’s approval, **WLC** are granted to faculty members who develop a new course or new course format (e.g., convert a regular class to an online format). For undergraduate courses a maximum of 3.0 **WLC** may be earned per course. For graduate courses, a maximum of 3.0 **WLC** may be earned per course. **WLC** are not earned in circumstances where the faculty member is separately compensated for course development. Faculty members who are assigned to teach a new course preparation may be eligible for course development **WLC** upon recommendation of the Department Chair and with the Dean’s approval.

**WLC Earned via Research Activities**

The mission of the college includes the creation and dissemination of knowledge with global impact. Consistent with this mission objective, scholarly activities that earn **WLC** include:

1. Conducting basic research that is published in refereed academic journals, books, monographs, presented at academic meetings, or documented in working papers.
2. Creating applied or integration scholarship that is published in professional journals or presented at professional meetings.
3. Conducting or creating teaching/learning scholarship this is published in refereed educational journals or documented in working papers.
4. Conducting or creating other forms of scholarship that advance the mission of the college.
5. Professional development undertaken to acquire or update research expertise.

Faculty members who are active in scholarly pursuits may earn 6, 9, 12, or 15 **WLC** for scholarly activity each academic year. The level of scholarship-related **WLC** assigned to a faculty member is based on the Department Chair’s evaluation of the individual’s scholarly productivity for the preceding three years. This evaluation is tied to the faculty member’s scholarly activities which serve to maintain status as a *Scholarly Academic* or *Scholarly Practitioner* under AACSB accreditation standards. Faculty members meeting or exceeding the minimum requirements to maintain their scholarly status should generally be assigned 12 or 15 **WLC** depending on the level of activity and the judgment of the Department Chair. Faculty members not meeting minimum requirements, but who are devoting sustained effort to scholarly activity, should generally be assigned 6 or 9 **WLC** depending on the level of activity and the judgment of the Departmental Chair. A faculty member who is not engaged in any scholarly activities is assigned 0 **WLC**.

*WLC Related to Extraordinary Professional Development*

Faculty members who are awarded a Faculty Development Leave related to research activities receive an additional 9 **WLC** for research. Faculty members who are awarded a Third Year Teaching Reapportionment semester (full release from teaching) receive 9 **WLC** to support research-related professional development. First year faculty members may receive an additional 3 **WLC** to support research-related professional development activities.

**WLC Earned via Service Activities**

Under university policy, faculty members receive credit for service activities based on the amount of time and commitment these activities require. All full-time **T** and **TT** faculty members are expected to perform service-related work for the university and/or their profession. Under university policy, the service load of a **T** or **TT** faculty member should not fall below 10%. Full-time **NTT** faculty members may be assigned service duties. Service-related **WLC** are earned via:

1. Serving on a departmental committee, taskforce, or other body.
2. Serving on a college university committee, taskforce, or other body.
3. Serving on a university committee taskforce, or other body.
4. Serving on a system-level committee, taskforce, or other body.
5. Serving in an academic or professional organization.
6. Serving in as an editor or reviewer for an academic or professional journal.
7. Serving in an advisory role for a student organization.
8. Engaging in significant outreach efforts to business firms.

The above list is illustrative of important service activities and is not all-inclusive.

A typical **T** faculty member is expected to spend about 20% of their time (8 hours per week) on service activities. **TT** faculty members are expected to spend about 10% of their time (4 hours per week) on service activities. Full-time **NTT** faculty members assigned to teach the equivalent of 8 courses per academic year are expected to spend about 20% of their time (8 hours per week) on service activities. **NTT** faculty members assigned to teach the equivalent of 10 courses per academic year are not expected to perform service activities.

**WLC** earned via service activities are determined by the Departmental Chair and are based on the Chair’s assessment of the faculty member’s service involvement relative to expectations. Table 3 provides information regarding **WLC** earned via service activities.

|  |  |  |  |
| --- | --- | --- | --- |
| **Table 3**  **WLC Credits for Typical Service Assignments** | | | |
|  | **WLC Credit** | | |
| **Departmental Chair’s Assessment of**  **Service Involvement** | **Tenured Faculty Member1** | **Tenure-Track**  **Faculty Member2** | **Nontenure-Track**  **Faculty Member1** |
|  |  |  |  |
| Unsatisfactory | 0 credits | 0 credits | 0 credits |
| Does Not Meet Expectations | 3 credits | 0 credits | 3 credits |
| Meets Expectations | 6 credits | 3 credits | 6 credits |
| Exceeds Expectations | 9 credits | 6 credits | 9 credits |
|  |  |  |  |
|  |  |  |  |
| Note: This table presents only the more commonly occurring examples for service time allocations. Department chairs will use this table as a guide and make appropriate adjustments to determine **WLC** for less common circumstances. | | | |
| 1 - Presumes a 20% time allocation to service duties. | | | |
| 2 - Presumes a 10% time allocation to service duties. | | | |

**WLC Earned via Administrative Activities**

Some faculty members perform administrative duties. These individuals earn 3 to 12 WLC depending on the duties undertaken. Table 4 lists these activities and the **WLC** they earn.

|  |  |
| --- | --- |
| **Table 4**  **WLC Earned via Administrative Activities** | |
| **Administrative Activity** | **WLC Earned**  **per Year** |
|  |  |
| Department Chair | 12 credits |
| Assistant Department Chair | 6 credits |
| Associate Dean | 6 credits |
| Program Advisor | 6 credits |
| Ph.D. Area Coordinator | 3 credits |
| Internship Coordinator | 3 credits |
|  |  |

**WLC Earned via Dean Credits**

For special situations that benefit the College, the Dean may assign up to 15 workload credits to a faculty member during a year (these ‘Dean credits’ would be similar in purpose and function as the previously used ‘Presidential credits’).

**Appendix A**

**Rule 31006 – *Regents’ Rules and Regulations***

**The University of Texas System**

**Rules and Regulations of the Board of Regents Rule: 31006**

1. **Title**

Faculty Workload and Reporting Requirements

**2. Rule and Regulation**

Sec. 1 Purpose. Pursuant to *Texas Education Code* Section 51.402, this Rule establishes the general workload policy for faculty employed at an academic institution of higher education in The University of Texas System. The Rule also establishes the reporting requirements associated with faculty workload.

Sec. 2 Importance of Faculty. Faculty play a fundamental role in advancing an institution of higher education and in fostering student success. The quality and value of a university education are in large part defined by the faculty. The curricula the faculty design, the programs they offer, the learning environment they create, the instructional methods they employ, the research they conduct, the creative works they produce, the service they provide, and their professional engagement with students inside and outside of the classroom, including advising, are important components of the educational experience. As such, institutions of higher education supported by public funds have the responsibility to fully utilize their faculty resources in ways that achieve the greatest possible educational benefit.

Sec. 3 General Provisions for Faculty Workload

Sec. 3.1 Through established shared governance processes, each academic institution shall establish a faculty workload policy that adheres to the following general provisions.

Sec. 3.2 The institution’s workload policy shall set forth equitable and fair guidelines that permit each department chair (or head of a comparable academic unit), under the supervision of the dean, to best deploy departmental faculty to foster student success and advance the department’s mission.

Sec. 3.3 A chair may assign differential teaching loads for circumstances such as graduate instruction, research activities, time bought out by external grants, administrative assignments, large class sizes, team-taught courses, significant advising responsibilities, or other activities aligned with the institution’s mission and/or critical to student success.

Sec. 3.4 A chair may assign differential teaching loads based on the expectations of tenured and tenure-track faculty who have active and productive research/scholarly/creative programs, tenured faculty who are less active in research/scholarly/  
creative work, and nontenure-track faculty.

Sec. 3.5 An institution’s faculty workload policy shall recognize that classroom teaching, basic and applied research, service, and professional development are important elements of faculty workloads by giving appropriate weight to each activity when determining the standards for faculty workload.

Sec. 3.6Each institution may give the same or different weight to each activity and to other activities recognized by the institution as important elements of faculty workloads.

Sec. 3.7 The president of each academic institution shall submit the initial faculty workload policy for review and approval by the Executive Vice Chancellor for Academic Affairs.

Sec. 4 Reporting Requirements

Sec. 4.1 The president shall designate an officer to monitor workloads, prepare and review appropriate workload reports, and submit the reports to the institutional head for certification or approval and comments as may be appropriate.

Sec. 4.2 Each institution shall include its faculty workload policy in its operating budget reported to the Texas Higher Education Coordinating Board.

Sec. 4.3 Each institution shall submit the Faculty Reports (CBM-008) required by the Texas Higher Education Coordinating Board.

Sec. 4.4 Within 30 days of the end of each academic year, each institution shall file with the Board of Regents a report, by department, of the academic duties and services performed by each member of the faculty during the nine-month academic year, showing evidence of compliance with requirements established by the Board.

Sec. 4.5 The report of academic duties and services performed by each member of the faculty, based on data submitted in the CBM-008, shall indicate all appointments held by the faculty member in the employing institution, the salary paid to each appointment, the percent of time of each appointment, and the source of funds from which salary payments were made.

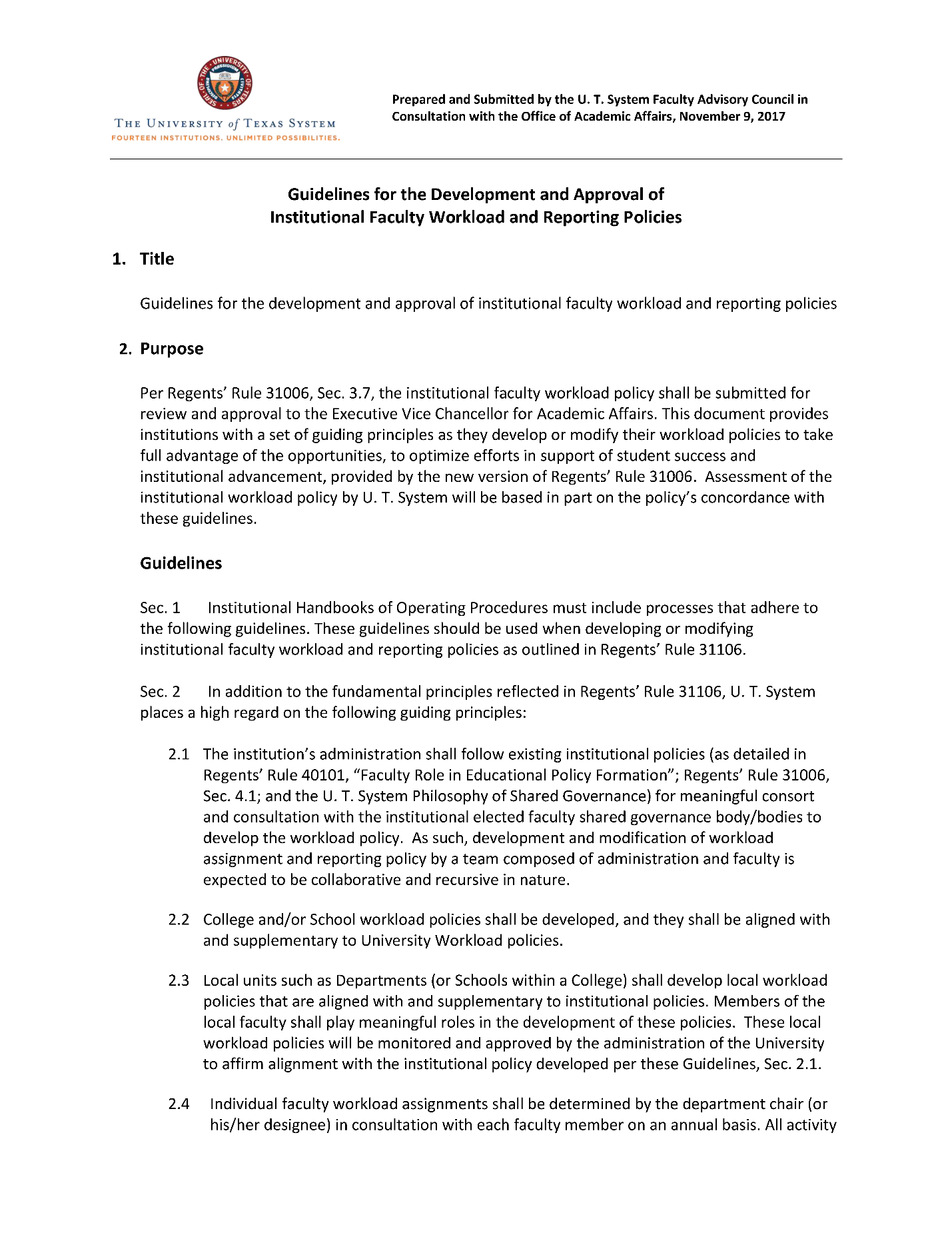
Sec. 4.6 For a faculty member paid partially from a source of funds other than state appropriations, the teaching load shall be proportioned to the percentage of salary paid from state appropriations.

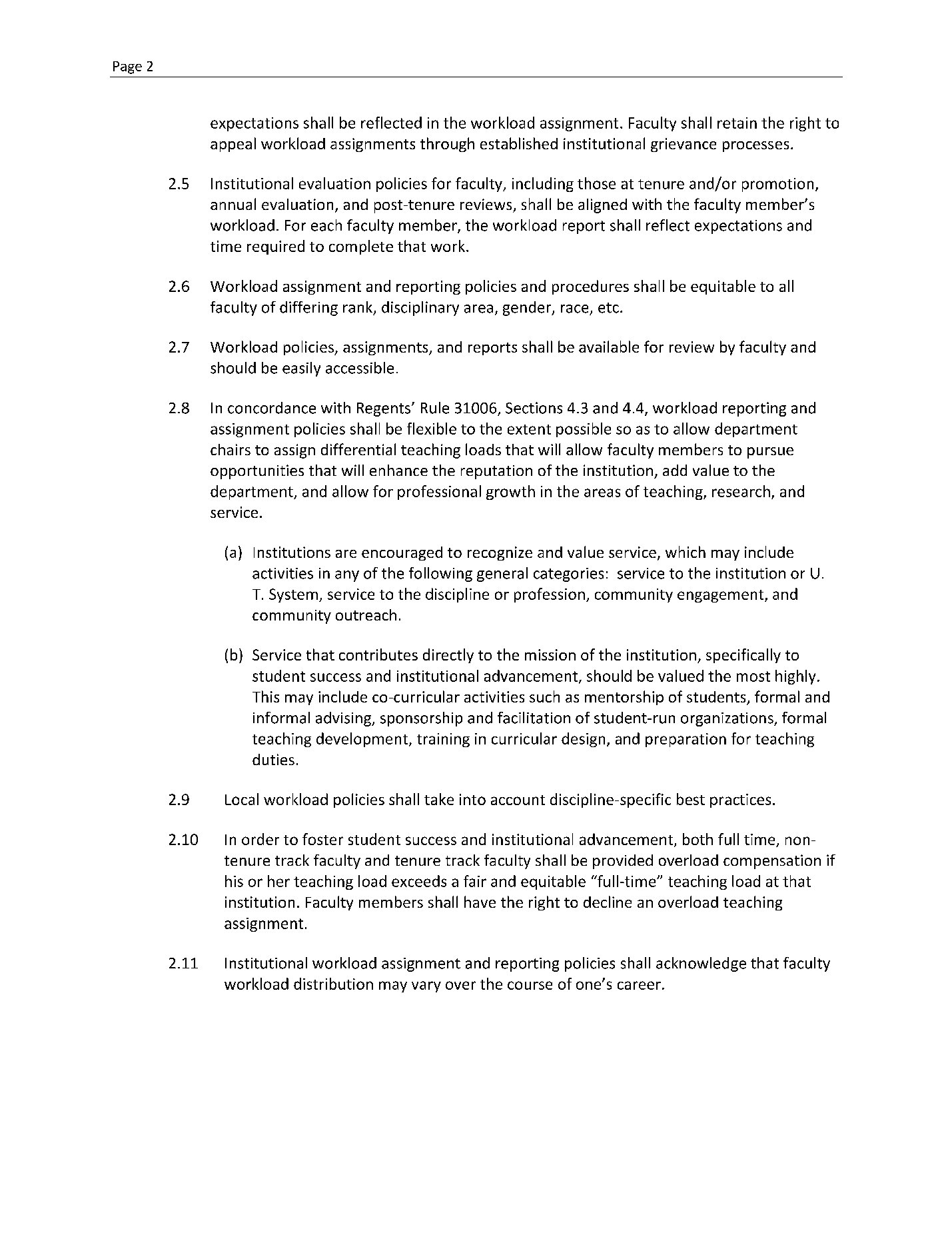
Sec. 4.7 Upon the request of an institution, if additional time is needed to prepare the report to the Board of Regents, the Executive Vice Chancellor for Academic Affairs is authorized to extend the deadline for submission.

**Appendix B**

**Guidelines for the Development and Approval of**

**Institutional Faculty Workload and Reporting Policies**

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**Appendix C**

**University Workload Policy**



Academic Workload Policy

January 23, 2019

**Purpose**

The purpose of this operating policy is to establish workload policy and rules for determining faculty workload at the University of Texas at Arlington in compliance with UT System Regents Rule 31006.

**Policy**

The UT Regents’ vote on RR 31006 on November 9, 2017 authorizes each academic institution to develop faculty workload policies that optimize efforts in support of student success and institutional advancement. UTA’s workload policy aligns with RR 31006 and acknowledges the range of activities encompassing the breadth of faculty workload.

**Procedures**

The workload of each full time and part-time faculty member encompasses teaching, research, service, and in some cases, administrative duties as determined by each department and college/school with recognition of contributions to student success. Each faculty member’s teaching load, including the number of credit hours taught or equivalent duties as assigned by the department chair or comparable academic administrator in consultation with each faculty member, is but one aspect of workload. In assigning faculty to their various duties, department chairs or comparable academic administrators must assign workload so that:

* Overall workload distribution shall be equitable and fair to all faculty of differing rank, disciplinary area, gender, race, etc.and in a manner that is consistent with the unit’s mission;
* The department, school and college meet its instructional obligations to both undergraduate and graduate programs and students;
* The department, school and college deploy faculty resources to maximize support for student success;
* The workload guidelines for each college/school acknowledge faculty participation in research, teaching, service and administrative duties.

Each college/school develop workload guidelines through a shared governance process. These guidelines are reviewed by the Office of the Provost for compliance with the new university policy. In addition, units used the following guidelines to develop and implement workload processes:

* Individual faculty workload assignments shall be determined by the department chair or comparable academic administrator (or his/her designee) in consultation with each faculty member on an annual basis. Faculty workload is negotiated yearly and is subject to needs of the department and college/school such as budget, course rotation/programmatic needs and student success initiatives as examples.
* Faculty shall retain the right to appeal workload assignments through established institutional grievance processes.
* Institutional evaluation policies for faculty, including those at tenure and/or promotion, annual evaluation, and post-tenure reviews, shall be aligned with the faculty member’s workload distribution. For each faculty member, the workload report shall reflect expectations and time required to complete that work.
* Workload policies, assignments, and reports shall be available for review by faculty and should be easily accessible.
* Institutional workload assignment and reporting policies shall acknowledge that faculty workload distribution may vary over the course of one’s career.
* College and school workload guidelines will be reviewed every five years by college and school faculty.

Workload Credits (WLCs) may be divided between teaching, research, service, and administration. A suggested customary WLC distribution for tenured and tenure-track (T/TT) Faculty assignment is 40% teaching, 40% research, 20% service, and 0% administration, and for non-tenure track (NTT) faculty 80% teaching, 0% research, and 20% service, and 0% administration or 100% teaching.

College/school and departmental policies denote how WLC is allocated and workload assigned across the four primary areas of teaching, research, service, and administration. Faculty may vary in their assigned workload distribution per the processes defined in Regents’ Rule 31006 and annual and periodic review. HOP Section 6-505 (Minimum Faculty Academic Workload Requirements) workload distribution will be used in assessing overall annual, periodic, promotion and tenure, and other faculty evaluations such that assessments of areas of work are weighted by assigned workload. While the quality of work is of primary importance, the total workload should be considered as well (e.g., a faculty member producing significantly more than the standard WLC in a year).

**Research and Creative Activities**

Research and creative activities conducted by faculty are discipline-specific and vary greatly between academic departments. The UTA workload policy takes this diversity of faculty research activities into account including scholarly efforts geared towards student success. Each department and college/school shall establish criteria for assessing and reporting workload credits arising from research activities.

Each department must also have clear, measurable expectations for research workload that are aligned with the notion of “meets expectations” in the annual review. In addition, the guidelines must clearly define “exceeds expectations.”

Professional development supporting research and creative activities should be defined by college and departmental policies, and taken into consideration in determining workload credits.

High research T/TT faculty may have a lighter teaching load as determined by the department chair or comparable academic administrator. Also, NTT faculty may receive workload credit for research per their college/school guidelines.

**Teaching**

Teaching is an integral part of our university mission. In order to meet college teaching responsibilities, teaching load shall be set by colleges, schools, and departments/programs to be aligned with their disciplines and peers, and in consideration of a faculty member’s total contribution in research, creative productivity, professional achievement, and service.

Tenure-track faculty in years 1-5 (probationary faculty) may receive a lighter teaching load to accommodate the development of their research agenda.

For tenured faculty, teaching loads may be adjusted for teaching productivity as measured by class size, for either high or low research or scholarship productivity, for either high or low productivity in external funded research and other discipline specific measures, and for significant service and administrative appointments. Teaching workload may be adjusted by the buyout of courses from funds provided by external grants or from funds associated with endowed faculty appointments. College guidelines should specify maximum buyout of organized courses along with exception criteria.

Tenured faculty members with low research and service contributions are expected to teach up to eight courses per academic year as a recognition that teaching is their primary contribution to the unit.

For full-time non-tenure stream faculty, their primary responsibility is instruction of organized courses, service, and professional development. The teaching load is nominally ten courses per year depending on service or administrative obligations.

Faculty support student success in many ways beyond the traditional classroom. Faculty’s role in the student experience and student success is vital. Faculty activities outside of the classroom and those that contribute to students’ sense of belonging as well as academic success are an integral part of faculty work and need to enter into any workload calculation. Below are some examples of (but not restricted to) workload credits:

* Participation in college/school or university student success initiatives and activities.
* The creation of programs, courses and projects relevant to internships and career development, service learning, leadership, student research and study abroad opportunities that contribute to the Maverick Advantage (high impact practice participation) and student success.
* Participation in faculty advising, mentoring and coaching programs to enhance student belonging.
* Development of new curricula, programs or courses (face-to-face and online), and instructional and curricular redesign to promote student engagement and student success.
* A research example of a student success effort is the investigation of the pedagogy of teaching that maximizes student learning effectiveness.
* The development, teaching (individual or team) and enhancement of first year experience, independent study, conference course, lab/studio and practicum courses.
* Chairing or serving on Master’s Thesis, Project Report committees, and Dissertation committees.
* Training and supporting of teaching and research assistants.

The responsibility of assigning teaching duties resides with the unit/department heads and deans. The Office of the Provost monitors these assignments for compliance and equity, and provides appropriate reports in accordance with state requirements and the UT Regents Rules.

**Overload**

An overload is defined as teaching an organized course that produces workload in excess of 100% workload distribution in an academic year, not including Summer (for nine-month contract). Solely exceeding 100% workload distribution does not automatically justify academic overload compensation.

Courses taught as an instructional overload may not be used for credit towards future workload obligations if they are compensated in addition to regular salary. Compensation may be in the form of either financial compensation, a reduced course load in the same academic year or following year if the department teaching obligations and budget permit, or adjusted workload assignments in other areas (viz., research, service, administration).

**Equivalencies**

Regents Rule 31006 states that “each institution may give the same or different weight to each activity and to other activities recognized by the institution as important elements of faculty workloads.”

To allow consistency for reporting and analysis, UTA provides a list of equivalencies in its Workload Manual.

* Additional value for organized instruction maybe set by the college/school guidelines as impacted by course size, whether it is face-to-face or online, length of course or other criteria.
* Additional credit may be provided to teaching loads for labs, studios, dissertation/thesis advising, post-doctoral training, and other courses requiring extensive interaction between students and faculty as determined by each college/school's guidelines.
* Teaching load for large undergraduate classes that require extensive grading and evaluation of student work may be weighted based on enrollment of course or other criteria as stipulated in the college/school guidelines.
* Professional development supporting teaching should be defined by each college/school in departmental policies and taken into consideration in determining workload credit.

**Service**

Service encompasses a faculty member’s contributions to departmental, college, university, or system activities or to a faculty member’s profession, community and public service as related to the discipline. Faculty members are expected to participate in and contribute to service activities at the University of Texas at Arlington.

As a public institution is committed to student success, UTA values the role that faculty play in engaging with students, student support services and other programs that partner with students on their path to graduation. Faculty should receive service credit for these activities commensurate with the amount of time and commitment these activities require. Note that some of the workload directly contributing to student success mentioned above under ‘Teaching’ may also be considered ‘Service’ workload here. Faculty cannot count these activities for both categories and must decide, in consultation with their department chair or comparable academic administrator, in which area (e.g. teaching or service) they are to receive credit for the student success activities.

Each department and college/school shall establish criteria for assessing and reporting workload credits arising from service activities. In no case will the service workload for tenured or tenure-stream faculty be below 10%, as all faculty must participate in shared governance and basic service duties to the department, college, university, or system. Service load will vary for NTT faculty and may be zero.

As a general guideline, service activities include any functions performed in the best interests of the state, system, or university, which do not qualify as administrative, instructional, or scholarly activities. Common service activities include: (1) participation in system, university, college/school, and departmental committees; (2) representation on university/system bodies such as the Graduate Assembly, Faculty Advisory Council, Faculty Senate, and Undergraduate Assembly; (3) work performed on behalf of academic, professional, scholarly, or student organizations, (4) development of on and off campus activities contributing to student sense of belonging and success, and (5) other work as may be defined by college and department workload policies.

**Administration**

An administrative appointment is an assignment granted to a faculty member at the departmental, college/school or university level.

Each department and college/school shall establish criteria for assessing and reporting workload credits arising from administrative activities. At a minimum, colleges/schools and departments will have policies defining administrative workload levels/credits associated with the following administrative positions: (1) dean, associate dean, or assistant dean; (2) school director, chair, associate chair, or assistant chair; (3) program director or coordinator; (4) director of a university center or institute; (5) section coordinator; or (6) other administrative assignment designated by the college/department.

The President, Provost, Dean, or Chair/Director appoints individuals to these positions. The Dean will take into account program and department size, complexity (such as the number of reporting units, enrollment cycles, online programs, accreditation reporting and evaluation cycles such as re-accreditation years, etc.), multiple degree formats, student success needs (such as evaluation of advising access and DFW rates), and other reasonable factors affecting work time in determining the appropriate workload credit for administrative tasks.

Professional development supporting development of administrative skills should be defined by college/school and departmental policies and taken into consideration in annual evaluation.

**Definitions**

**Faculty**

People hired to teach classes at institutions of higher education or whose specific assignments are for the purpose of conducting instruction, research, or public service as a principal activity (or activities) and who may hold academic rank titles of professor, associate professor, assistant professor, instructor, other faculty or the equivalent of any of these academic ranks. (CBM008: <http://www.thecb.state.tx.us/reports/PDF/1316.PDF?CFID=77237381&CFTOKEN=53644601>)

**Teaching/Instructional Activity**

Direct instructional activities which include interaction with students related to instruction, preparation for such instruction, and evaluation of student performance. The various types of instruction include: lecture, laboratory, practicum, seminar, independent study, private lessons, self-paced instruction, televised instruction, supervision of thesis, and dissertation (<http://www.thecb.state.tx.us/reports/pdf/0204.pdf>)

**Research and Creative Activity**

Percent of time, in relation to a normal workload as defined by the institution, devoted to faculty assignments in activities specifically designed to produce research and creative activity outcomes.

**Service**

Service encompasses a faculty member’s contributions to departmental, college, university, or system activities or to a faculty member’s profession, community and public service as related to the discipline. Common service activities include: (1) participation in system, university, college/school, and departmental committees; (2) representation on university/system bodies such as the Graduate Assembly, Faculty Advisory Council, Faculty Senate, and Undergraduate Assembly; (3) work performed on behalf of academic, charitable, professional, scholarly, or student organizations, and (4) other work as may be defined by college and department workload policies.

**Administration**

An administrative appointment is an assignment granted to a faculty member at the departmental, college or university level. Administrative appointments include 1) dean, associate dean, or assistant dean; (2) chair, associate chair, or assistant chair; (3) program director; (4) director of a university center or institute; (5) section coordinator; or (6) other administrative assignment designated by the college/department.

**Overload**

A faculty member who is employed full time and has a teaching assignment that produces workload in excess of a 100% assignment in an academic year not including Summer (if a nine-month contract).

**Appendix D**

**College Mission Statement**

**MISSION**

We create and disseminate knowledge with global impact that engages the business community and positively impacts society. We seek to be ranked among the top business schools in the nation.

**VISION**

We develop recognized business thought-leaders who create value and enrich our world.

**VALUES**

**Integrity:**

We do the right thing, always being honest, transparent, and accountable.

**Respect:**

We treat all people in a way that affirms their individual uniqueness, worth, and dignity.

**Diversity:**

We pursue an inclusive environment where individual differences create value.

**Excellence:**

We continually strive to achieve the highest levels of performance in all our endeavors.

**Collaboration:**

We team with internal and external partners to create and accomplish shared goals.