

Reporting Faculty Workload Assignments

BOR Committee on Academic and Student Affairs
BOR Committee on Personnel Affairs and Board Governance
January 7, 2021



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Goal

- Improve our ability to report faculty workloads timely and accurately
- Create a mechanism to assist department/division/college and campus leadership to more easily track and manage faculty workload
- Provide aggregated information for institutional accountability
- Improve the University's ability to assess and revise classification of its faculty as called for in SR 149, S.D. 1, 2019

Process for creating report

1. Review data and improve data quality
2. Create a template and process for collecting information for 4-year university campuses
3. For CC's, Teaching Equivalencies set in policy, and as of October 2019, non-teaching TEs input into Banner
4. Create an annual report combining both university and CC data

Improving Data Quality

Worked with campus schedulers, Banner, and other parties to:

- Improve ability to accurately assign credits for team-taught classes by utilizing % responsibility function

[https://www.hawaii.edu/ovppp/sdoc/2019_10_Banner_Coding_for_Faculty-\(3\)_Consolidated_Memos_and%20Attachment.pdf](https://www.hawaii.edu/ovppp/sdoc/2019_10_Banner_Coding_for_Faculty-(3)_Consolidated_Memos_and%20Attachment.pdf)

- Revise codes for Schedule Type to clearly reflect type of class and standardize usage across campuses

[https://www.hawaii.edu/ovppp/sdoc/Revised_Recommendations_to_Standardize_Schedule_Type_Codes_Memo_\(1\).pdf](https://www.hawaii.edu/ovppp/sdoc/Revised_Recommendations_to_Standardize_Schedule_Type_Codes_Memo_(1).pdf)

- Use new coding agreements to identify Early College and Study Abroad programs

https://www.hawaii.edu/ovppp/sdoc/Banner_Coding_Recommendation_For_the_Early_College_Program.pdf

UH Mānoa Faculty Workload Policies

From UH Mānoa workload summary, July 2015

For tenure-line faculty, ranks I3 and above, workload is not solely fulfilled by teaching regular classes. In addition to classroom teaching, all tenured and tenure-line faculty are required to do significant research and professional/administrative service, as well as instructional activity that is not measured in credit hours. As a result, these faculty members seldom teach more than 18 credit hours per year (more than three 3-credit classes a semester).

Commonly, one-third to two-thirds of a faculty member's time will be spent on research, service, and instructional activities not measured by credit hours. So, for example, a faculty member might be teaching the equivalent of 15 credit hours per year and spending the equivalent of 9 credit hours per year fulfilling such other responsibilities.

UH Hilo and West O‘ahu Workload Policy

UH Hilo

From Teaching Workload Assignments and Equivalencies

Tenure track faculty typically teach 18 credit hours (WCH) per semester and are typically granted 6 WCH per academic year to conduct an equivalent amount of research and service.

<https://hilo.hawaii.edu/policies/teaching-workload.php>

UH West O‘ahu

From Overload FAQs

What is the standard teaching load at UH West O‘ahu? A: The standard teaching assignment for full-time instructional faculty at UH West O‘ahu is 24 credits per year (CBA III.F). Each tenured and tenure-track faculty member is typically assigned 3 credits of release time per semester for scholarship and service.

https://westoahu.hawaii.edu/wp-content/uploads/docs/general_info/2018-2019_Faculty_Workload_Policies.pdf

Creating a template for use at 4-year campuses

- Work with three UH Mānoa colleges (LLL, Engineering, and CTAHR) to develop workable template
- In addition to classes taught, included five categories:
 - Research: Credit equivalencies from research in place of teaching as part of regular workload
 - Service: Credit equivalencies for activities, outreach, student support, etc. in place of teaching
 - Extension (for Agriculture only): Credit equivalencies of outreach as part of regular duties
 - Administrative: Credit equivalencies for administrative duties that reduce teaching load
 - Buyout: Salary partially paid from extramural funds to increase research activities
- IRAPO pulls data on courses taught
- Colleges/departments/divisions to fill in the five categories
- Collection completed in December 2020 for AY2020 and still being processed

Faculty Assignment template

FacultyAssignmentTemplate

Home Insert Draw Page Layout Formulas Data Review View Acrobat

Normal Page Break Preview Page Layout Custom Views Ruler Formula Bar Zoom 55% Gridlines Headings Zoom to 100% Zoom to Selection New Window Arrange All Freeze Panes Freeze Top Row Freeze First Column Split Hide Unhide Switch Windows View Record Macro Use Relative References

C20 DEPARTMENT

FACULTY ASSIGNMENT

ACADEMIC YEAR 2020 (Fall and Spring)

GENERAL INFORMATION

| | | | |
|---|--|--|---|
| Average or General Departmental Expectations Teaching Credits: _____ Individual Instruction Credits: _____ Credits for Admin: _____ Non-Admin Release: _____ | Includes: I-faculty (Instructional Faculty, job code starts with an I, excludes assignments that are Overload, Noncomp, Casual, or Lecturer) Faculty Data Source: HR Datamart, PSQEMPL Course credit Data Source: ODS, IRO_SOCCOMB | Teaching = credits from courses taught Individual Instruction = Calculated credits taught based on formula at the top of the worksheet Adjustments = Credit adjustments for special cases where teaching credit should not be assigned Research = Credit equivalencies from research in place of teaching as part of regular workload | Extension - Credit equivalencies of outreach as part of regular job duties, if applicable Buyout = Paid research to reduce teaching load Admin = Credits for administrative duties that reduce teaching load Overload = Research or extra teaching for summer Grant Dollars Received = Dollar amount of grants attributed to the faculty for the year. |
|---|--|--|---|

Individual Instruction Calculation

| | |
|-------------------------------------|-------------------------------|
| Directed reading (-.99): | undergraduate: 10 SSH = 1 SHR |
| | graduate level: 5 SSH = 1 SHR |
| Thesis (700) or dissertation (800): | 1 student = 1 SHR |
| Other variable credit courses: | SSH / no. of students |
| UHM - ITE390, ITE392 | 2.67 students = 1 SHR |
| UHM - ITE391 | no semester hours |
| UHM - MUS199 | no semester hours |
| WDA - DRR | no semester hours |

Departments are responsible for filling out the following sections:

- 1) Teaching Credit Adjustments, if applicable
- 2) Teaching Credit Equivalencies (Research, Service, Extension, Buyout, Admin)
- 3) Other information for Grant Dollars Received and Overload
- 4) Comments such as justifications or explanations

Put all teaching credit adjustments in the "adjustments" field and put an explanation for the adjustment in the comments field.

FACULTY INFORMATION

| HUMAN RESOURCES | | | | | COURSES TAUGHT WITH AT LEAST 1 REGISTRATION (Course and number of sections) | | TEACHING CREDITS | | | | TEACHING CREDIT EQUIVALENCIES | | | | | TOTAL (must be no less than 24) | OTHER | | COMMENTS (Include explanation for adjustments and to less than 24) |
|-----------------|-----------|------------|-------|--------|--|-------------|------------------|------------------------|-------------|-------|-------------------------------|---------|-----------|--------|-------|------------------------------------|----------|--|---|
| NAME | ID NUMBER | DEPARTMENT | TITLE | STATUS | F19 Classes | S20 Classes | Teaching | Individual Instruction | Adjustments | Total | Research | Service | Extension | Buyout | Admin | Grant Dollars Received | Overload | | |

Community Colleges Workload Data Collection

UHCC Policy 9.237 establishes the standard teaching assignment for full-time instructional faculty:

- Defines Common Teaching Equivalencies for each type of class (by schedule type)
- Establishes responsibilities for implementation of the policy
- Based on UHPA contract, describes common non-instructional activities that are assigned Teaching Equivalencies

Community Colleges Workload Data Collection

15 codes created to designate type of non-instructional workload to be input into Banner

- Research
- Administration: Admin assignment, College Committee Chair, Curriculum Committee, Curriculum or Program Development, Division/Department Chair, Faculty Senate Chair, Grant/Contract Admin, Grant/Contract Development, Institutional Service, Professional development, Program Director/Coordinator
- Service
- Other Release time

Data and codes being reviewed after first year of implementation for AY2020

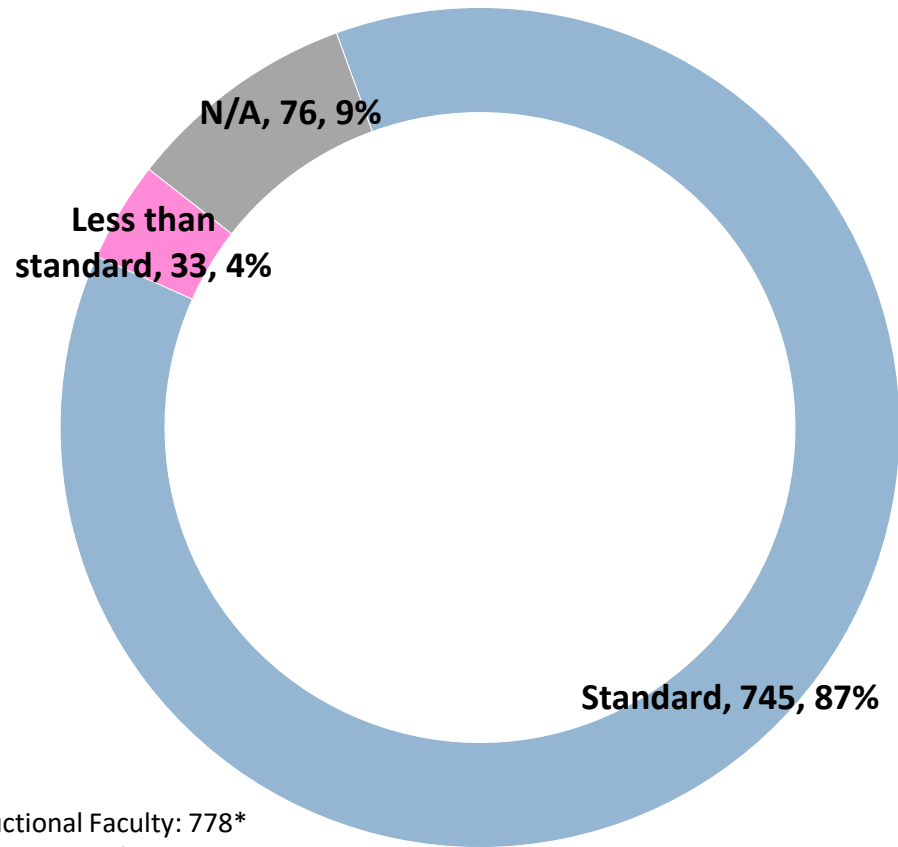
Current Status of Faculty Workload Data by Major Unit

Faculty Assignment Report

- Initially only includes tenured and tenure-tracked Instructional faculty (I and J faculty at Mānoa, I faculty at Hilo and West O‘ahu, Instructional C faculty at the Community Colleges).
 - M faculty (UH Mānoa - JABSOM) are not yet included in this report.
 - Two community colleges, Honolulu and Leeward, are currently included.
- N/A category includes non-standard load faculty that have left their position, had at least one semester of sabbatical, or took leave resulting in reduced credit assignment. These faculty are included in the N/A category in the campus headcount, but excluded from the Teaching Equivalency (TE) charts.
- Data provided in these slides are from Fall 2019 and Spring 2020 semesters, but are preliminary. Departments may still revise their data.

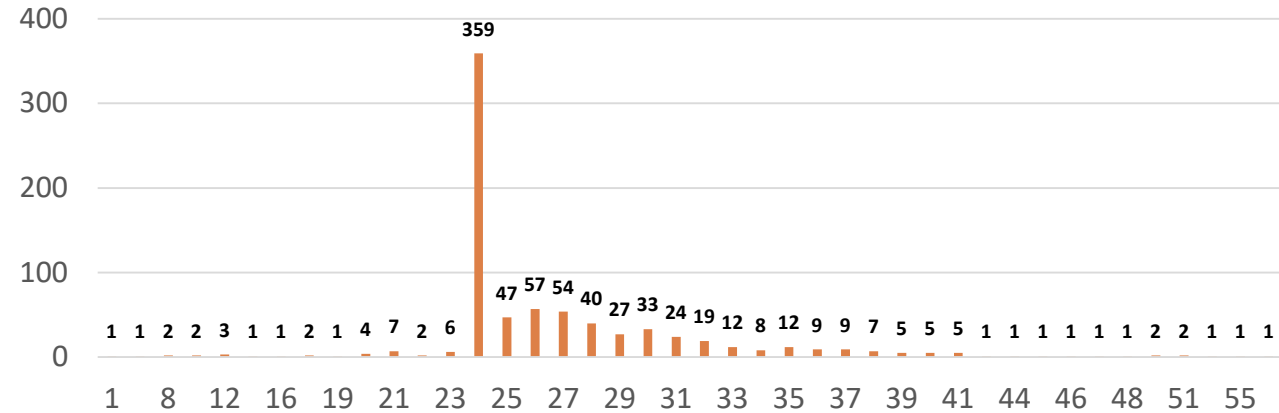
UH Mānoa Faculty Assignment

UH Mānoa Faculty Load (Headcount)

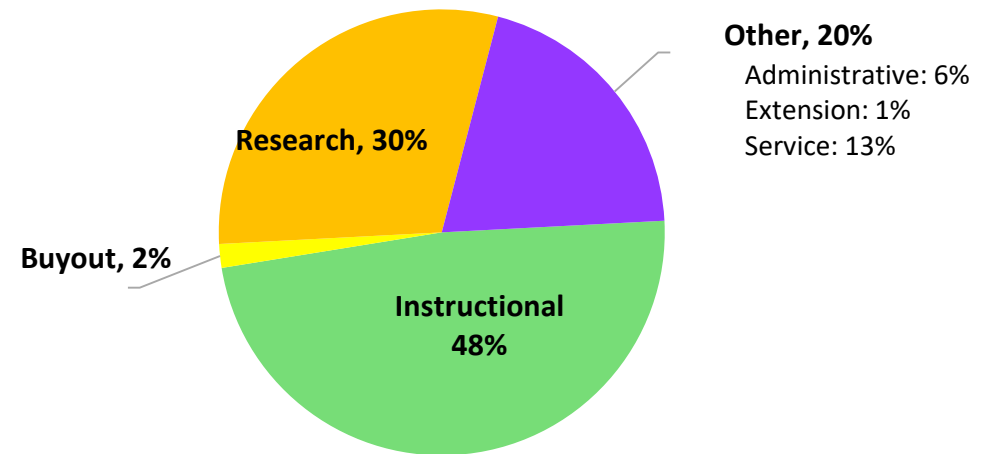


Total Instructional Faculty: 778*
 Total N/A Faculty: 76*
 * Excludes JABSOM faculty counts.

UH Mānoa Faculty Headcount by Total Workload (by Teaching Equivalencies)**



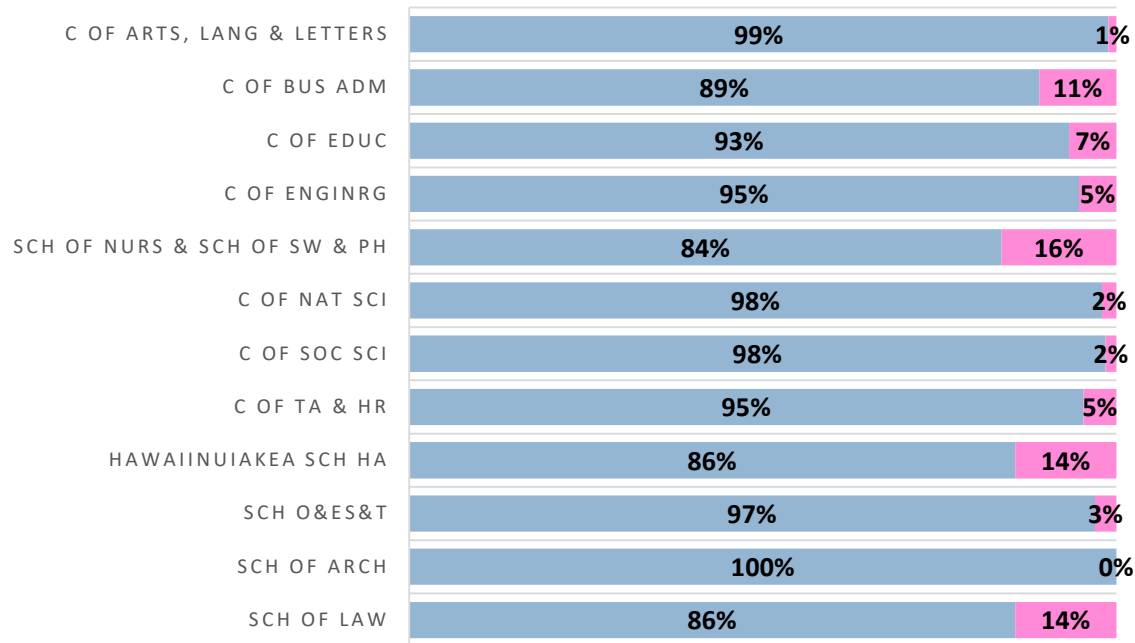
UH Mānoa Faculty Load by Type (by Teaching Equivalencies)**



** Excludes faculty in "N/A" category of the campus headcount.

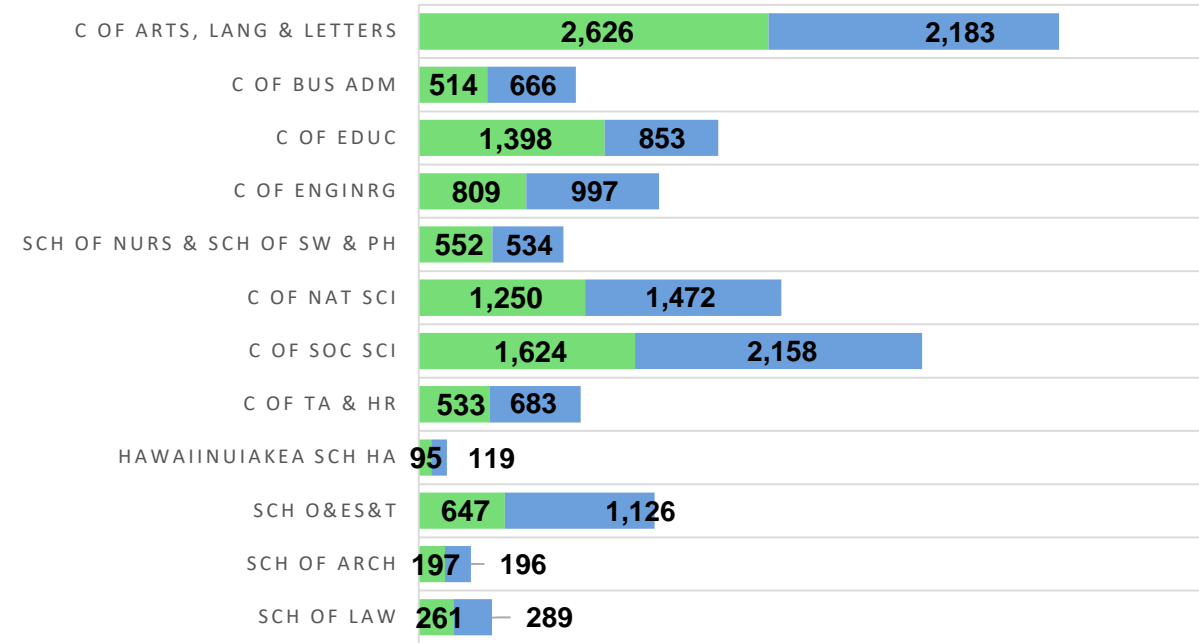
UH Mānoa Faculty Assignment (2)

UH Mānoa Faculty Load by Colleges/Schools/ORUs (by Percent of Headcount)*



■ Standard ■ Less than standard

UH Mānoa Faculty Load by Colleges/Schools/ORUs & Type (by Teaching Equivalencies)*

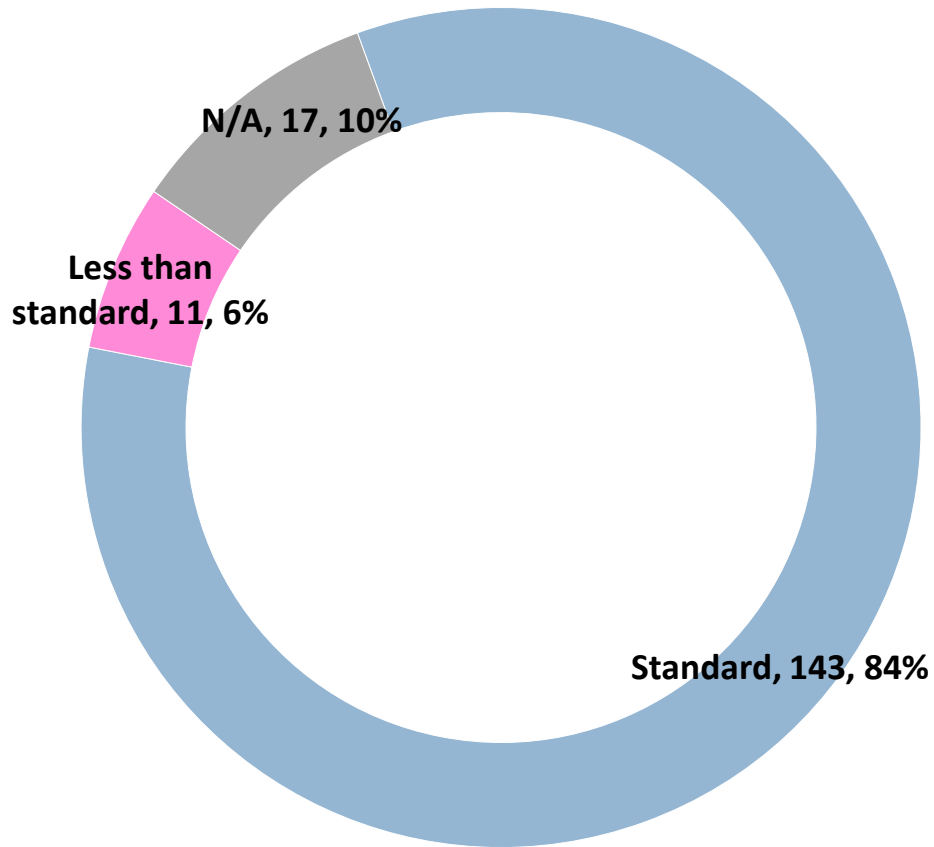


■ Instructional ■ Non-Instructional

* Excludes faculty in "N/A" category of the campus headcount.

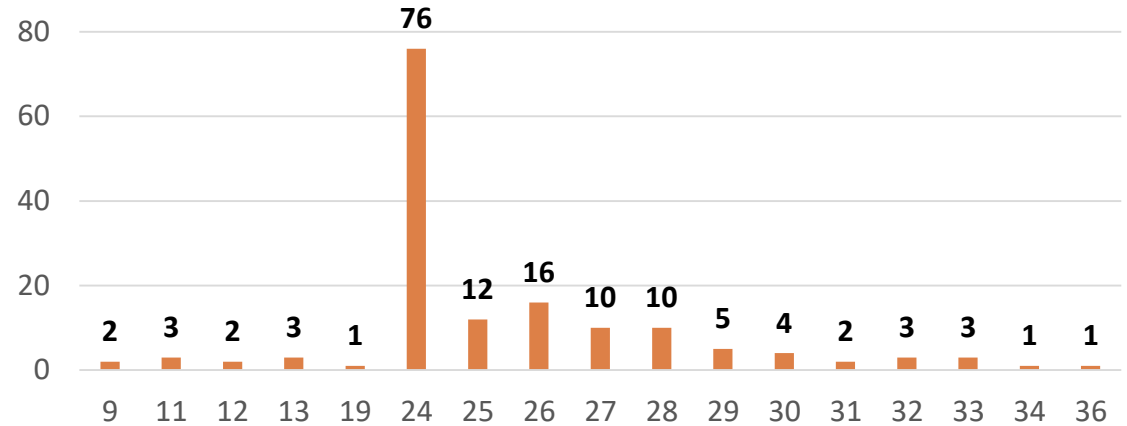
UH Hilo Faculty Assignment

UH Hilo Faculty Load (Headcount)

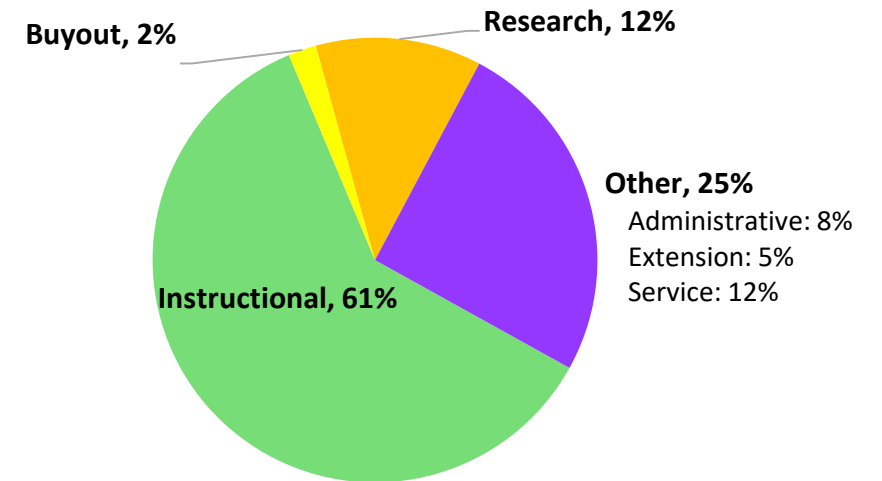


Total Instructional Faculty: 154
 Total N/A Faculty: 17
 Total Faculty: 171

UH Hilo Faculty Headcount by Total Workload (by Teaching Equivalencies)*



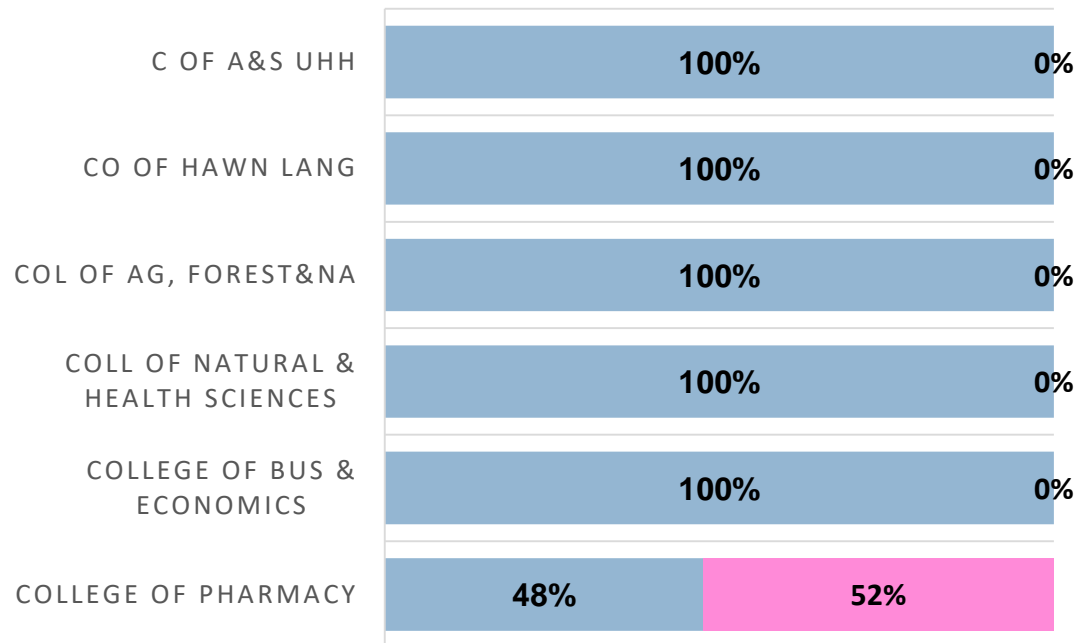
UH Hilo Faculty Load by Type (by Teaching Equivalencies)*



* Excludes faculty in "N/A" category of the campus headcount.

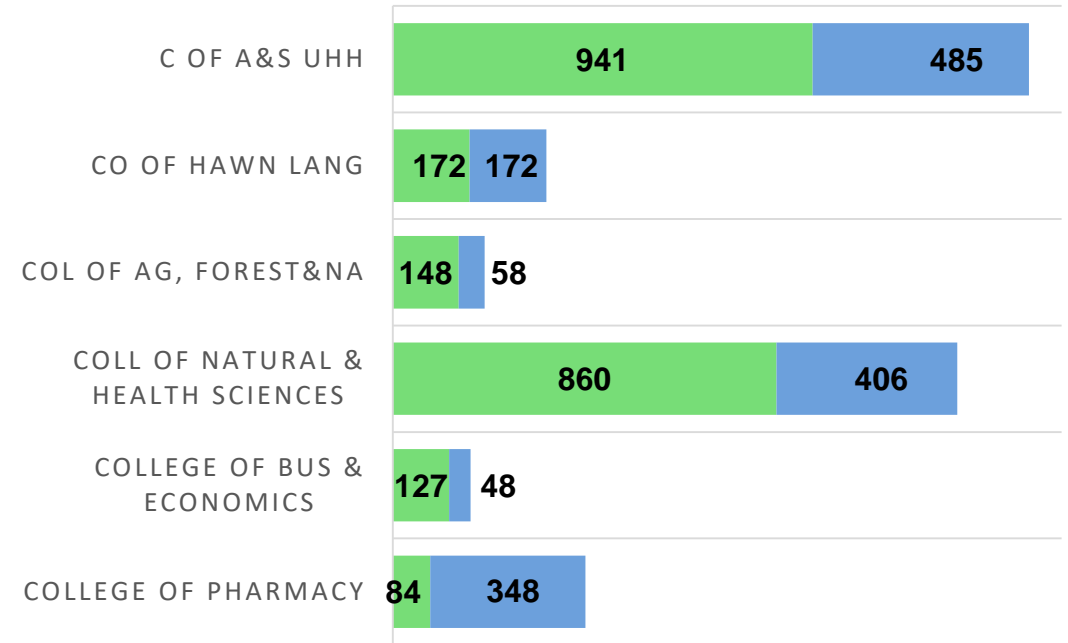
UH Hilo Faculty Assignment (2)

UH Hilo Faculty Load by Division/Department
(by Headcount)*



■ Standard ■ Less than standard

UH Hilo Faculty Load by Division/Department & Type
(by Teaching Equivalencies)*

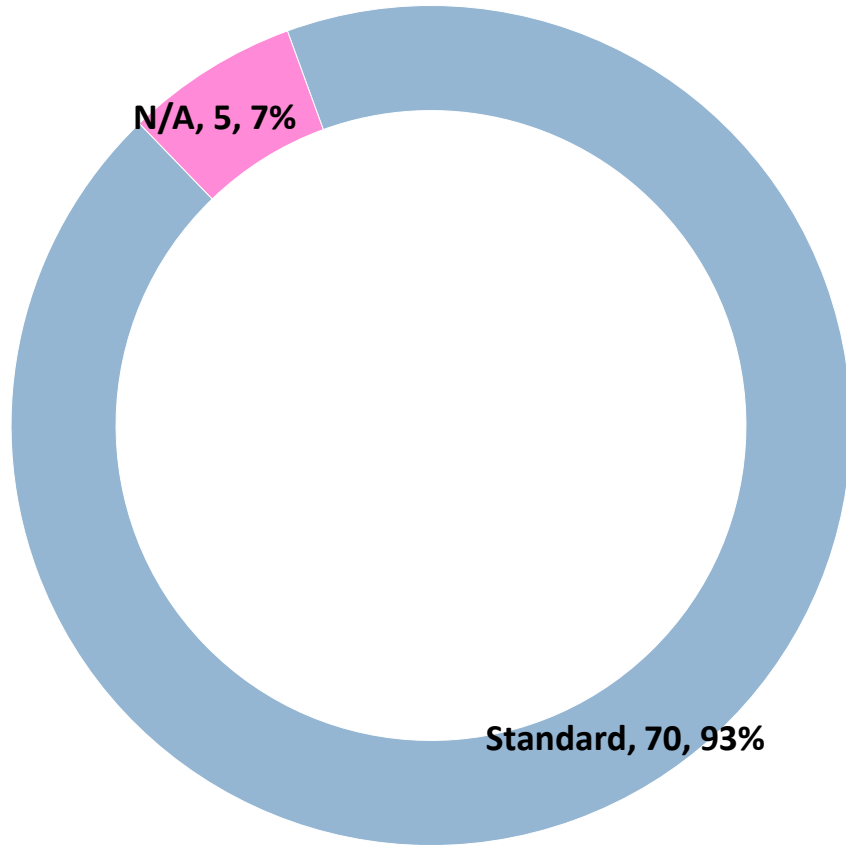


■ Instr ■ Non Instr

* Excludes faculty in "N/A" category of the campus headcount.

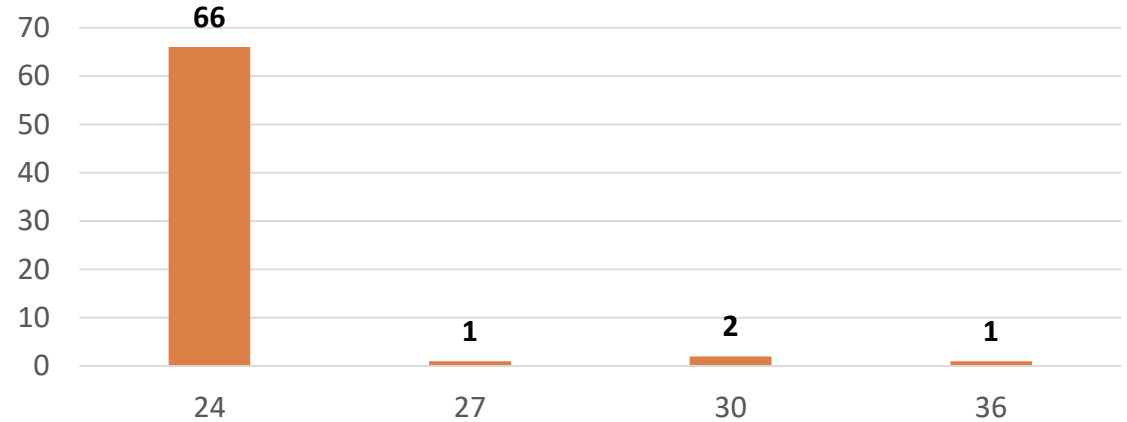
UH West O'ahu Faculty Assignment

UH West O'ahu Faculty Load (Headcount)

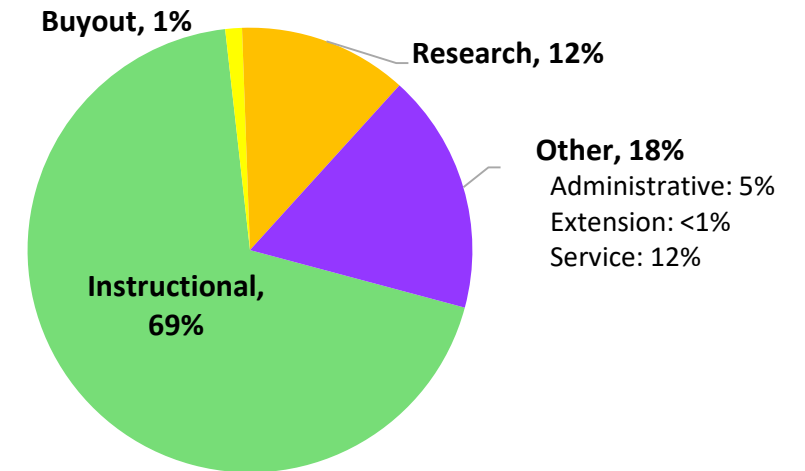


Total Instructional Faculty: 71
 Total N/A Faculty: 4
 Total Faculty: 75

UH West O'ahu Faculty Headcount by Total Workload (by Teaching Equivalencies)*



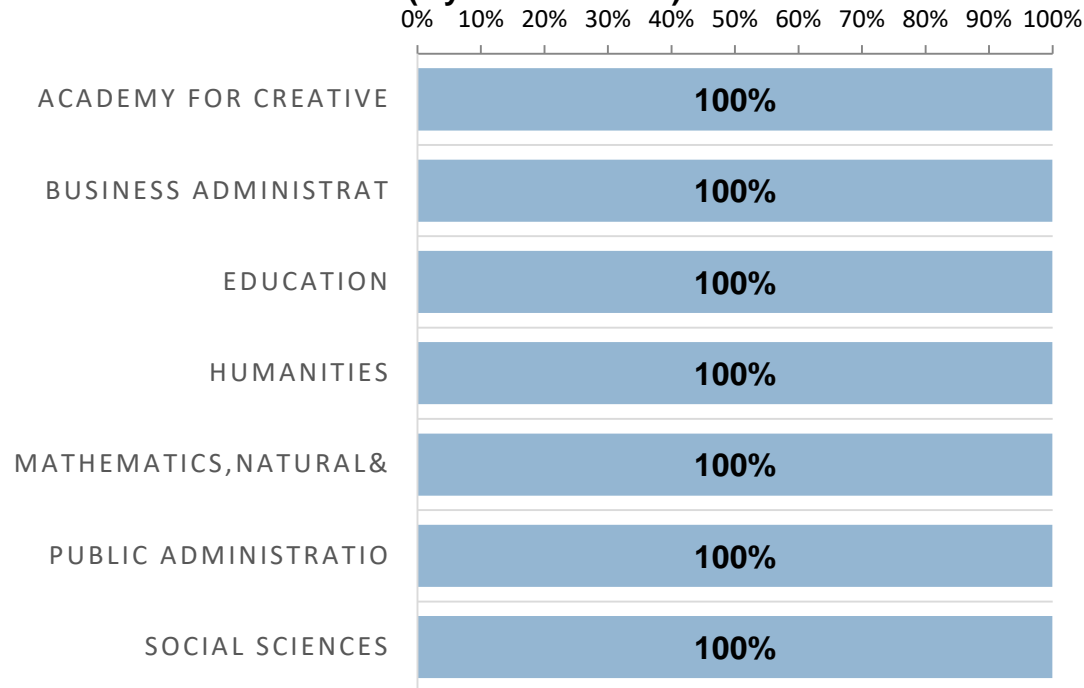
UH West O'ahu Faculty Load by Type (by Teaching Equivalencies)*



* Excludes faculty in "N/A" category of the campus headcount.

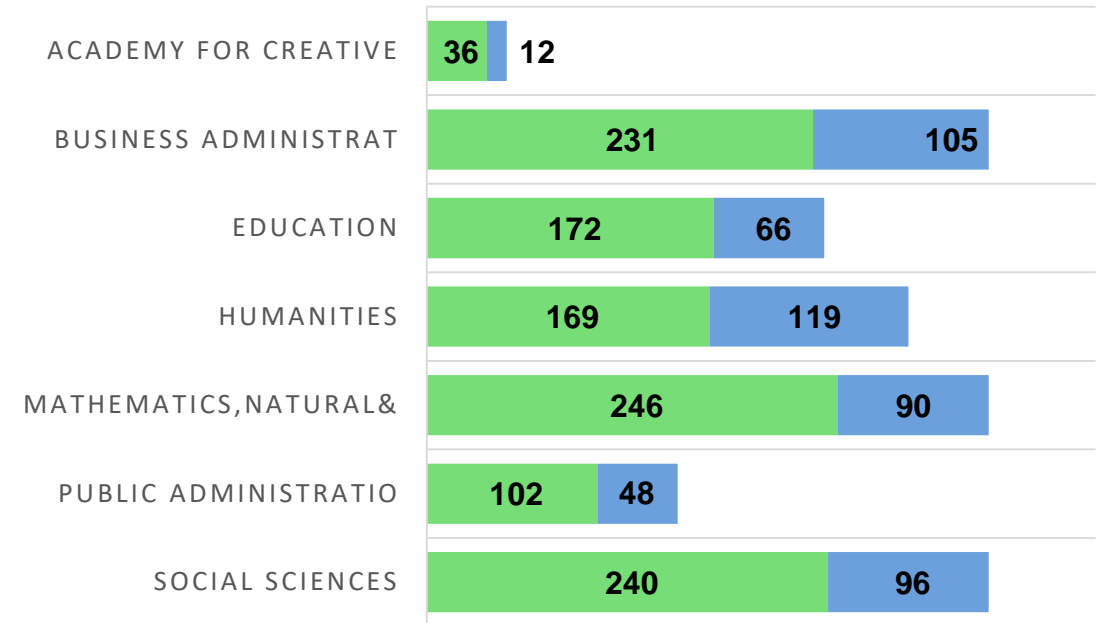
UH West O'ahu Faculty Assignment (2)

UH West O'ahu Faculty Load by Division/Department (by Headcount)*



■ Standard ■ Less than standard

UH West O'ahu Faculty Load by Division/Department & Type (by Teaching Equivalencies)*

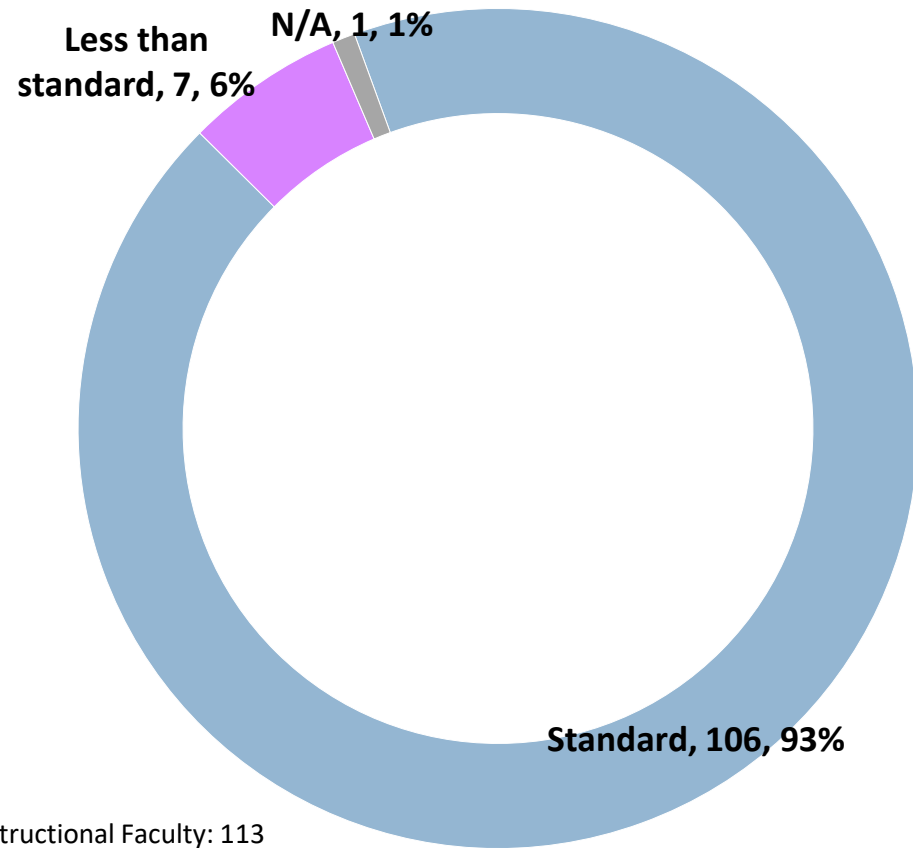


■ Instructional ■ Non-Instructional

* Excludes faculty in "N/A" category of the campus headcount.

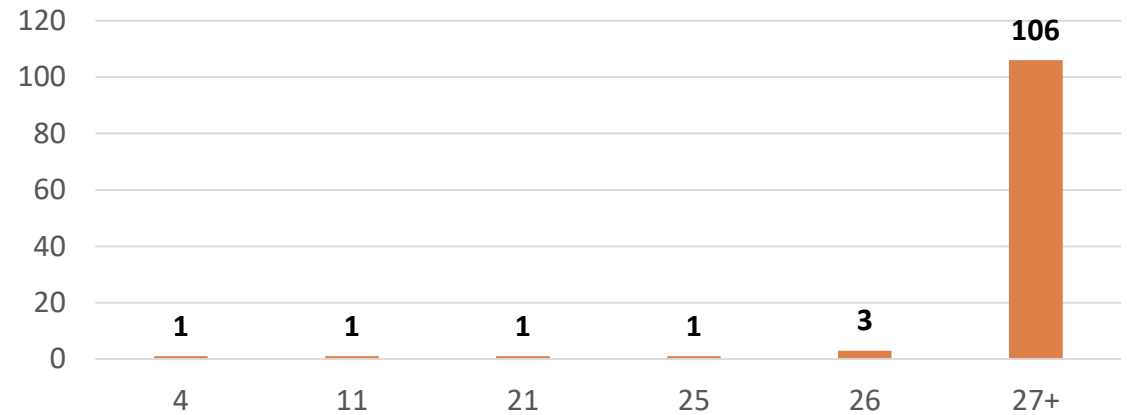
Honolulu CC Faculty Assignment

Honolulu CC Faculty Load (Headcount)

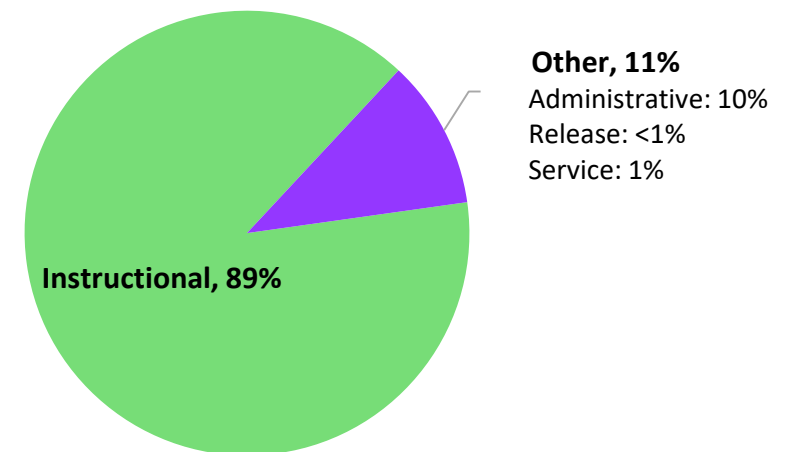


Total Instructional Faculty: 113
 N/A Faculty: 1
 Total Non-Instructional Faculty: 41
 Total Faculty: 155

Honolulu CC Faculty Headcount by Total Workload (by Teaching Equivalencies)*



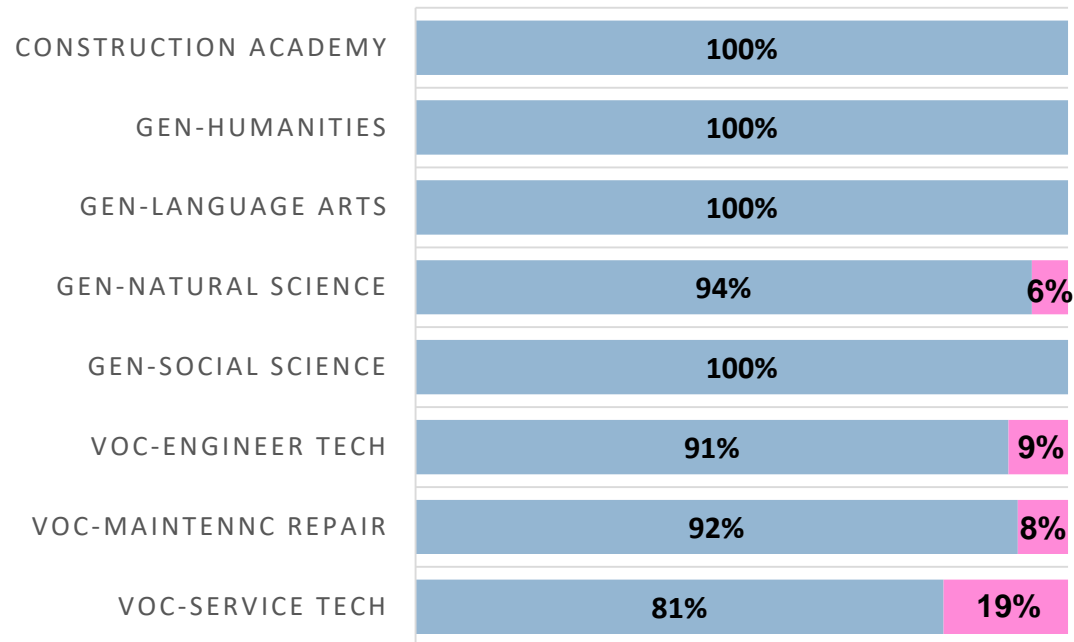
Honolulu CC Faculty Load by Type (by Teaching Equivalencies)*



* Excludes faculty in "N/A" category of the campus headcount.

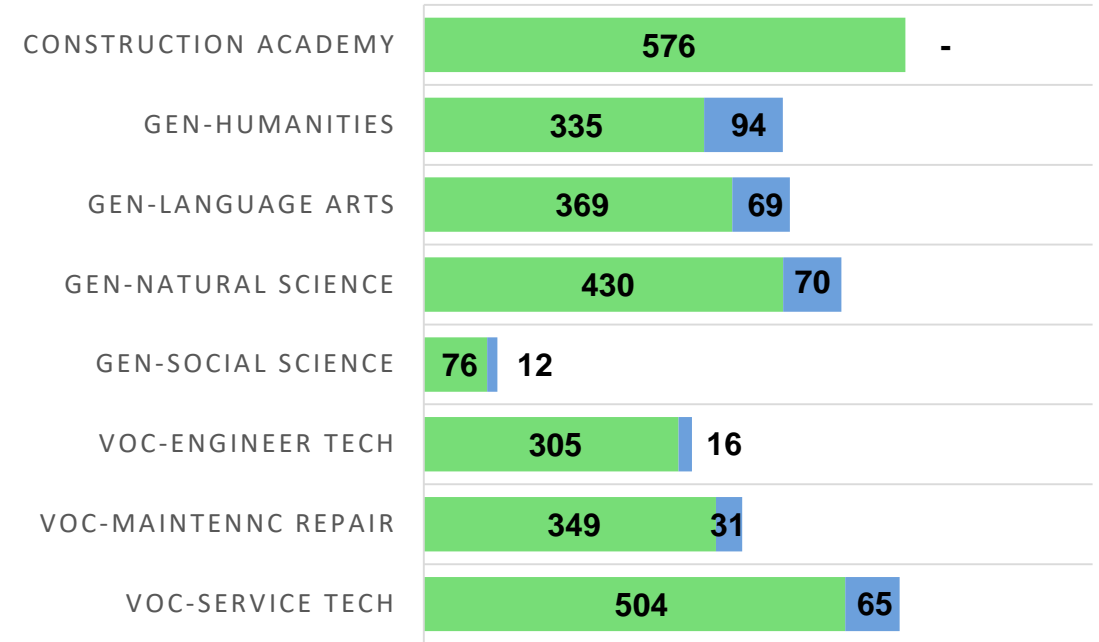
Honolulu CC Faculty Assignment (2)

**Honolulu CC Faculty Load by Department
(by Headcount)***



■ Standard ■ Less than standard

**Honolulu CC Faculty Load by Department &
Type
(by Teaching Equivalencies)***

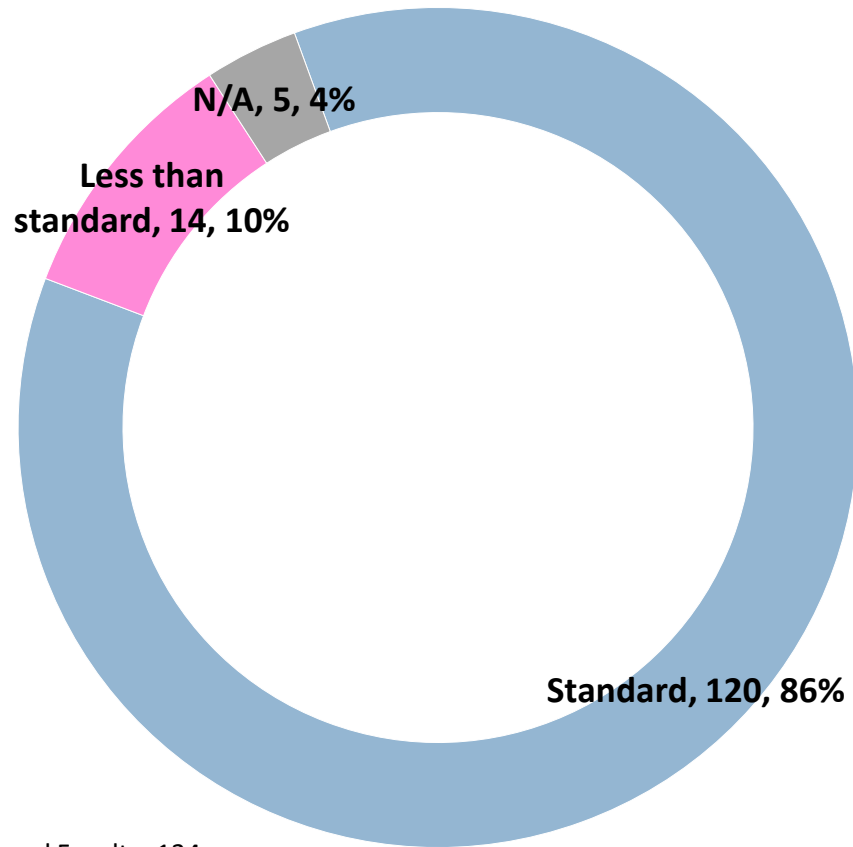


■ Instructional ■ Non-Instructional

* Excludes faculty in "N/A" category of the campus headcount.

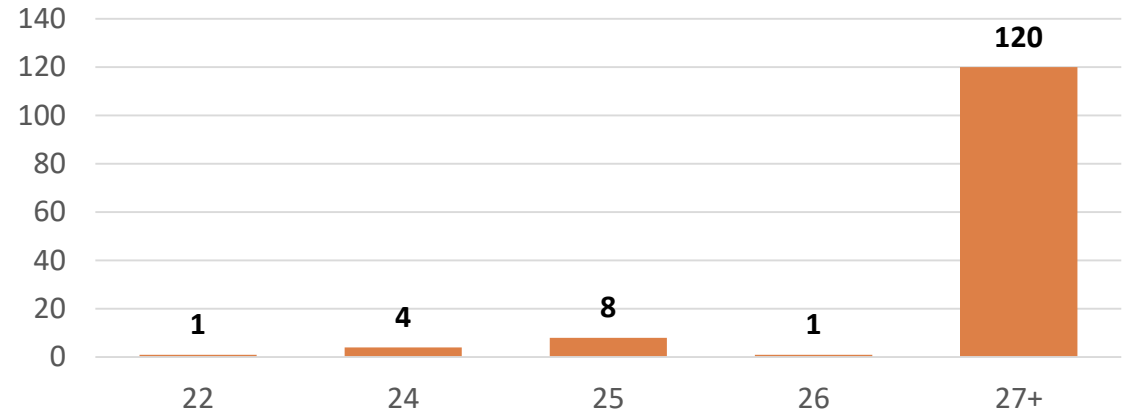
Leeward CC Faculty Assignment

Leeward CC Faculty Load (Headcount)

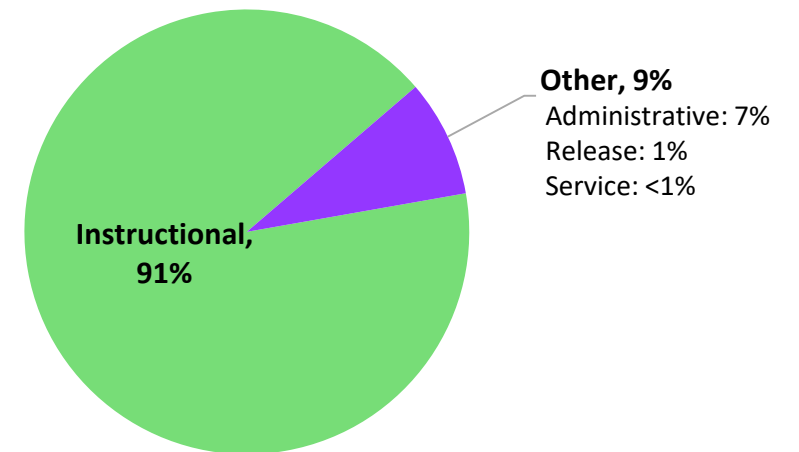


Total Instructional Faculty: 134
 Total N/A Faculty: 5
 Total Non-Instructional Faculty: 53
 Total Faculty: 192

Leeward CC Faculty Headcount by Total Workload (by Teaching Equivalencies)*



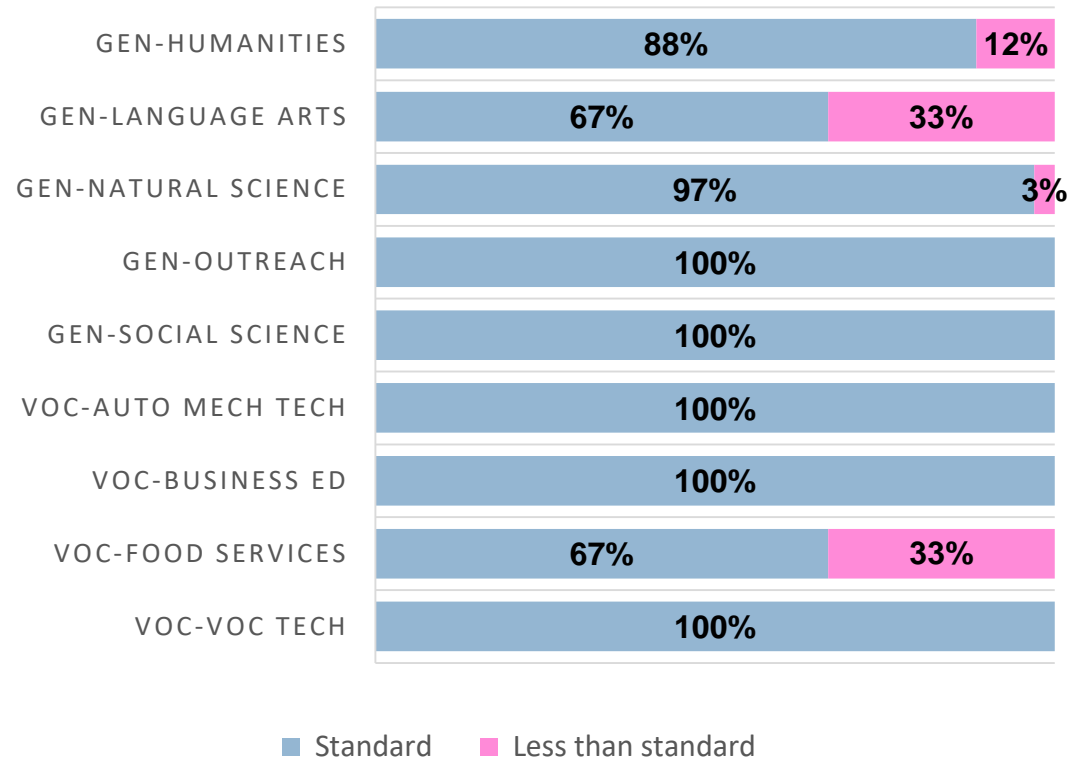
Leeward CC Faculty Load by Type (by Teaching Equivalencies)*



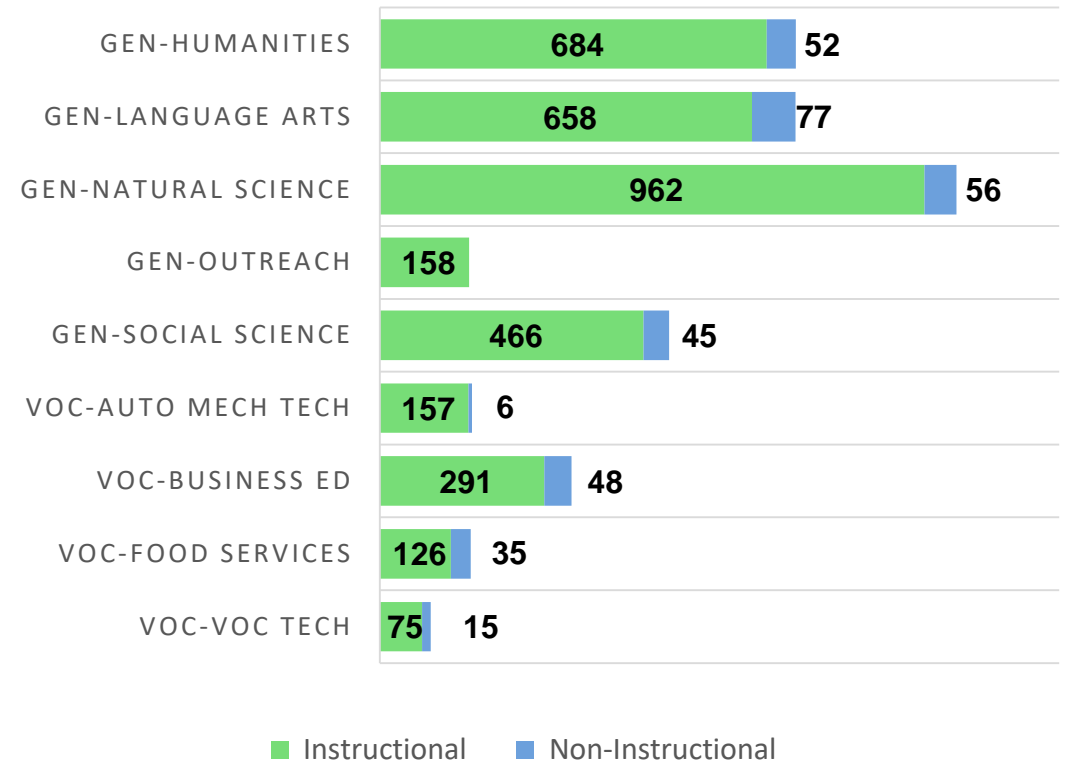
* Excludes faculty in "N/A" category of the campus headcount.

Leeward CC Faculty Assignment (2)

Leeward CC Faculty Load by Department (by Headcount)*



Leeward CC Faculty Load by Department & Type (by Teaching Equivalencies)*



* Excludes faculty in "N/A" category of the campus headcount.

Concluding Remarks

Current Issues

- Data quality issues remain and are being addressed
- Need to include other faculty types and units into template
- Need to develop equivalencies appropriate for each unit regarding what specifically constitutes the teaching equivalencies assigned for different types of instruction as well as research, service, extension (outreach), and administrative duties.

Next steps

- Prepare an annual report for the President and BOR with comments for improvement from Chancellors/Provost
- Continuously improve data
- Consider inclusion of non-instructional teaching equivalencies into Banner for the 4-year universities
- Initiate project to consolidate most faculty types (per SR 149, S.D. 1, 2019)