
SDSU WORKLOAD POLICY

**JOINT ADMINISTRATIVE/COHE WORKLOAD COMMITTEE
SOUTH DAKOTA STATE UNIVERSITY
BROOKINGS, SOUTH DAKOTA
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SOUTH DAKOTA STATE UNIVERSITY
November 19, 2003

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I. FACULTY UNIT MEMBER RESPONSIBILITIES

Upon accepting an appointment, a faculty unit member assumes responsibility in the three areas of: teaching (including advising); research, scholarship, and/or creative activities; and/or service (general or specific). In general terms, the workload for full time faculty unit members is 15 work units per semester, 30 work units per 9-month academic year, or 37.5 work units per year for 12-month faculty appointments.

A work unit is equivalent, in terms of time and effort involved, to teaching a one-credit lecture course which meets a minimum of 15 hours during a semester. The academic norm is that each class involves one hour of work in the classroom and two hours outside, for an average of 45 hours per semester for a one-credit class. Therefore, 30 work units is equivalent to 30 academic credits. The standard two-term workload is presumed to require 30 credit hours of undergraduate instruction or its equivalent per academic year.

Reasonable release time will be granted to faculty members who actively engage in research, scholarship or creative artistic activity or who actively pursue professional service activities related to their disciplines; ordinarily reasonable release time will involve up to six credit hours of undergraduate instruction, or its equivalent, per academic year. All faculty unit members are subject to shared-governance service obligations that are normally incidental to any full-time faculty appointment. Release time is not generally given for these. (See Section V.A.).

At SDSU persons with assignments in AES, CES, or a combination of teaching, research and/or specific service will have workload described in units or percentages, as necessary.

II. TEACHING AND ADVISING

Unless assigned to specific research/scholarship/creative activity or service, the teaching load is 15 undergraduate credits per semester or 30 undergraduate credits per academic year.

- A. Course Designation Values. Each course taught by faculty unit members in the instructional program of South Dakota State University will be assigned a course designation value. The 15 credits/units of formal instruction will be determined by summing the course designation values for the assigned courses.

The designation value for each type of course shall be determined based upon the guidelines described below. In these guidelines one class hour equals one contact hour.

1. Classroom Instruction
Courses taught in a lecture, seminar, discussion/recitation, workshop, special topics, and/or orientation format have a course designation value of 1.0, meaning that one semester credit equals one credit or workload unit.

2. Laboratory/Studio Instruction

It is recognized that there is a wide variation in the time required for preparation and evaluation of different types and combinations of laboratories/studios. The following laboratory classification is a guideline for assigning instructional workload credit for the teaching and/or coordination of laboratories. Credit for teaching laboratories/studios will be assigned according to written guidelines established and uniformly applied within each department. Classification of laboratories for purposes of determining workload credit within departments will be discussed and agreed upon by faculty unit members and department heads. In determining such guidelines departments may recognize factors such as course level, number of preparations, and staff appointed to assist in laboratory preparations. Departmental guidelines will be reviewed by the University Workload Committee for consistency with the University Workload Policy before these written guidelines are implemented.

- a. Intensive-preparation laboratories are those that require two hours or more of out-of-class preparation for each hour of in-class participation because of the work required in ordering, preparing and maintaining laboratory materials; scheduling and pre-running field activities for class field trips; ordering and developing reagent set-ups; complying with federal reporting guidelines for use of toxic and hazardous chemicals and proper maintenance of laboratory animals; evaluating and grading laboratory reports and student performance; providing for maintenance of complex mechanical and electronic equipment; updating in-laboratory presentations; supervising and training assistants to help with the work; and other necessary preparations. Such laboratories should receive a value of 1.0 work unit per classroom hour of instruction, unless the support system for preparing and/or conducting the laboratory justifies a lower value.
- b. Moderate-preparation laboratories are those that require an intermediate amount of outside preparation (approximately one hour outside of class for each hour in class) of the nature described above. Such laboratories should receive a value of 0.67 credits or work units per classroom hour.
- c. Low-preparation laboratories are those in which the student's work is conducted and evaluated during the time the laboratory meets. Such laboratories should receive 0.5 work units per classroom hour.
- d. Credit for coordination of multiple laboratory-section courses. A faculty member with sole responsibility for coordinating the laboratories of large courses, with multiple laboratory sections and instructors, will be given a minimum of 0.5 work units additional credit for serving as the coordinator. Additional credit for laboratory coordination should be uniformly applied within a department or college.

3. Individualized Instruction
Individual instructional activities include competency-based/self-paced study, independent study, design/research, private instruction, internship/practicum, and thesis courses and are dealt with in the “Workload Variations” Section II.C.

B. Advising

1. An Assignment in Advising
Advising is considered part of instruction under Appendix G of the BOR/COHE Agreement. Advising may be assigned to any faculty unit member. The advising load will be clarified in the workload description. Thirty (30) undergraduate advisees equal one work unit per semester based on the assumption that an adviser spends roughly an average of one and one-half hours per advisee per semester.
2. Coordinating Advising
Persons assigned responsibility to coordinate advising function and/or train/mentor others may be given workload credit for this function.

C. Teaching Workload Variations

Nothing in this section is intended to restrict the department head’s prerogative to reduce the workload units of formal instruction.

1. Teaching Workload Adjustments

The basic 15 credits of formal instruction may be decreased by a department head with the approval of the dean under circumstances such as:

- a. Travel regularly required for classroom or practicum/clinical experiences or other workload assignments (A general guideline in equating travel hours to work units will be one work unit per four hours of travel per week per semester);
- b. Teaching graduate classes involving intensive evaluation or preparation; supervision of individual instructional activities; advising of graduate students; and responsibility for supervising and/or setting up laboratories or similar group experiences;
- c. Teaching courses which are a combination of technology and distance education. Issues of workload emerge in, but may not be limited to, the following three categories of distance education course delivery:
 - ◆ Internet,
 - ◆ Interactive audio, video, multiple two-way interactive, or
 - ◆ Non-interactive (one-way delivery).

Possible workload variations when a course is taught via distance education with technology will be acknowledged and discussed with the faculty member teaching the course.

For the preparation and teaching of a course taught in one of the above categories, the workload value of the course may be increased. Up to 150% of the normal workload value may be used. In extraordinary circumstances this value may be exceeded.

- (1) Factors to be considered in determining the adjustment for workload value may include, but are not limited to, the following:
 - (a) Time for development and delivery of the course,
 - (b) Frequency of delivery of the course over preceding or subsequent semesters,
 - (c) Number of students taught,
 - (d) Number of sites to which the course is delivered,
 - (e) Degree of interactive work and feedback,
 - (f) Number of concurrent delivery methods being used for the course,
 - (g) Extent of assistance for the professor teaching the course, and/or
 - (h) Discovery of greater time commitment than previously anticipated and discussed.
 - (2) The workload adjustment may be distributed over more than one semester.
 - (3) Opportunity for orientation/training in using a new technology will be provided separately from a workload adjustment.
- d. Adjustment of Workload Credit for Large On-Campus Classes. In cases where the total enrollment in a faculty unit member's classes requires a faculty unit member to spend more than the usual amount of time (45 hours per unit per semester) to perform her/his teaching duties effectively, the faculty unit member shall receive additional work unit credits. The enrollment numbers used will be those on census day.

A faculty unit member who feels that he/she is entitled to additional work unit credits for enrollment overload shall discuss the matter with her/his department head before or sometime during the semester in which the overload occurs, and the two shall try to come to agreement on the number of workload units to be awarded or the level of supplemental help that may enable the instructor to meet the demands due to large class size. If agreement is not reached, the matter may be referred to the Workload Review Committee described in the "Workload Assignment" Section XII.

Extra workload unit credits for large classes can be applied by adjusting the workload for the semester in which the credits are earned or by adjusting the workload during the preceding semester or for one of the following two academic year semesters. In cases where it is difficult to adjust workload, the administration may, with the consent of the faculty unit member, pay extra compensation in lieu of workload adjustment.

- e. Other teaching related duties provided they are not in conflict with the BOR-COHE Agreement.
2. Course Preparations. A faculty unit member will be assigned no more than the equivalent of 18 distinct credits/units of course preparation per academic year (e.g., six three-credit courses or some combination of 1, 2, 3, etc. credit courses).

When program needs of a department require it, course preparations for a faculty unit member may exceed the above guidelines-but no more than 18 distinct units of course preparation will be assigned in the following academic year. In those cases where a faculty unit member has exceeded the guidelines per academic year, the department head will grant workload relief from activities covered under the BOR-COHE Agreement appendix titled "Statement Concerning Faculty Activities." (Appendix G.)

III. RESEARCH, SCHOLARSHIP, CREATIVE ACTIVITY

A faculty member's 15 credit per semester, 30 credit per academic year load, or 37.5 credit per calendar year load may be reduced and replaced with specific assignments such as:

- A. Reassignment for a percent time to a research/scholarship project or creative activity;
- B. Involvement in more extensive creative activities than can be accommodated under the basic workload;
- C. Assignment for a percent time to project(s) in the Agricultural Experiment Station or some other research entity at South Dakota State University.

IV. SPECIFIC SERVICE

Some university unit members serve solely in specific service roles such as the Cooperative Extension Service, the Animal Disease Research and Diagnostic Lab, testing labs, and/or auxiliary services. The workload of those persons may be described in terms of units or percentages depending on their specific role description. Workload for these persons should be within the 30 unit or 37.5 unit guidelines.

V. GENERAL SERVICE

- A. Normal shared governance service obligations including curriculum review, review of faculty and student qualifications and expectations, or academic unit programming or operations are considered part of a full-time teaching appointment. This may include activities such as, but not limited to, participating in the normal regular business and decision making of the department, college, and/or university.
- B. The basic 15 credits of formal instruction per semester may be decreased by a department head with the approval of the Dean under circumstances such as:
 - 1. Responsibility for co-curricular activities such as theatre, intercollegiate athletics, judging teams, musical units, forensics, and others;
 - 2. Special university assignments, such as preparation of reports for evaluation by accrediting associations, preparation of reports for the Board of Regents, special projects for the Regents or state government, etc;
 - 3. Major responsibility in committees or on task forces;
 - 4. Other service activities that can be described in terms of specific time effort with documented expectations/outcomes.

VI. OVERLOAD

If a 9-month faculty unit member is assigned more than 15 work credits/units during an entire semester, his/her fifteen credit work unit load will be decreased an equivalent number of work units during the preceding semester or one of the following two academic year semesters. If a 12-month faculty unit member is assigned more than 37.5 work credits/units during an entire year, his/her 37.5 work unit load will be decreased an equal number of work units during the preceding year or the following year. Alternatively the faculty unit member may be monetarily compensated for a mutually accepted increase in assignment over full time.

VII. FACULTY WITH CLINICAL OR FIELD EXPERIENCE ASSIGNMENTS

- A. Nursing. For clinical instruction, one work unit shall consist of two or more contact hours depending on the intensity of the clinical instruction and the amount of supervision needed. Instructional faculty members who have clinical responsibilities will not exceed 15 work units of combined clinical and/or theory instruction each week.
- B. Pharmacy. For clinical teaching in the College of Pharmacy, faculty unit members will be guided by the ACPE (American Council on Pharmaceutical Education) guidelines on workload and ratios in the teaching of laboratory and clinical experiences.
- C. Teacher Education. In addition to the general policies in this document, workloads for faculty unit members in teacher education, including special methods courses, will be guided by NCATE standards on teaching loads and ratios in the supervision of practicum experiences.
- D. Counseling. For clinical instruction in Counseling and Human Resource Development, faculty unit members will be guided by the Council for Accreditation of Counseling and Related Educational Programs (CACREP) standards on loads and ratios in the supervision of practicum and internship experiences.
- E. General. Responsibilities will be assigned to faculty unit members by the department head with the approval of the dean on an equitable basis and consistent with role expectations.

VIII. FACULTY WITH OTHER THAN FULL-TIME INSTRUCTIONAL APPOINTMENTS

In making assignments, the immediate supervisors of non-instructional faculty unit members affiliated with the Agricultural Experiment Station, Cooperative Extension Service, and special institutes will take into consideration the amount and frequency of travel necessary to accomplish the professional responsibilities of the unit members.

When faculty without full-time instructional appointments are assigned university teaching duties, they will have class time and class preparation time (two hours per unit hour) included as part of their assigned duties.

IX. OTHER SIMILAR ACTIVITIES – DEFINITION

“Other similar activities” in Appendix G entitled “Statement Concerning Faculty Activities” (Service) of the BOR-COHE Agreement will include joint COHE-administration committees created by this or the master agreement (Fringe Benefit Committee, Workload Committee, Promotion and Tenure Committee, State Agreement Management Committee, Institutional Agreement Management Committee, Workload Review Committee).

X. OFFICE HOURS

Faculty unit members will establish sufficient office hours to be available for student conferences and other client related duties. Faculty unit members have a responsibility to post office hours and to inform the department where they can be reached during those office hours if they must be absent.

XI. NIGHT AND OFF-CAMPUS INSTRUCTION

Faculty unit members may be assigned to teach classes during the late afternoon or evening and/or at locations other than the Brookings campus. Such assignments may be part of the 15 credits/units or may be compensated overload. The schedule and location will be discussed with the faculty member to facilitate performance of the workload. (See also Section II.C.1.a. relative to travel time.)

XII. WORKLOAD ASSIGNMENT

Prior to the start of each semester (or year if more appropriate) faculty unit members and department heads will discuss the assignments made by the department head and described on the Semester Workload Description form. If the department head and faculty unit member cannot reach agreement on workload unit credit for any of the assignments, the matter will be referred to a six-member joint administrative/faculty Workload Review Committee for resolution.

The President will appoint three administrators and COHE will appoint three faculty unit members to the Workload Review Committee as needed to resolve a workload complaint. This committee will render a decision within 25 working days after it has been asked to intervene.

WORKLOAD DESCRIPTION FORM

Department: _____ Time Period: _____

Name: _____ Date: _____

Academic Rank: _____ Phone: _____

Role (as contracted and paid):

- _____ % Instructional position
- _____ % Research/Development (e.g., AES appointments or special grant appointments)
- _____ % Extension Service (e.g., CES Specialists)
- _____ % Professional/Technical/Specific Service (e.g., ADRDL, Testing Lab, ICA, other special service assignment)
- _____ % Other – Specify _____

Expectations of Current Time Period in the Role:

(Based on workload as 100% assignment; letters refer to tables that follow)

- _____ % Teaching (A)
 - _____ % Advising (B)
 - _____ % General Research/Scholarship/Creative Activity (C)
 - _____ % Specific AES or Other Research Assignment (D)
 - _____ % Specific Service (CES, or service units such as test labs, etc.) (D)
 - _____ % General Service (e.g., professional, University, College) (E)
 - _____ % Other _____
- 100% Total _____

I. REGULAR WORKLOAD

A. Teaching:

Course Number	Course/Assignment	Section	Credit Hours	Count Census Day	Units
Unit Subtotal					

B. Advising:

	Number	Factor	Units
Advising Undergraduate Students		1 unit = 30 per sem.	
Advising Graduate Students*		1 unit =	
Advising Graduate Students on Thesis/Dissertation*		1 unit =	
Unit Subtotal			

* Please indicate the number of advisees equal to one unit in each category.

C. General Research, Scholarship, or Creative Activity: Description

Unit Subtotal _____

D. Specific appointment in CES, AES, or other Research, Extension, or Auxiliary Service Units: Description

Unit Subtotal _____

E. General Service Activity: (Discipline related)
Description

Unit Subtotal _____

F. Credit for Previous or Future Overload

Indicate Semesters: _____ Unit Subtotal _____

WORKLOAD UNIT TOTAL** _____

** 15.0 credits/units is considered a full-time 100% semester workload and
30.0 credits/units is a full-time load for a 9-month academic year.
37.5 credits/units is the 100% workload for faculty on 12 month appointments.

II. CURRENT OVERLOAD

Method of Compensation (Release Time or Payment)	Units

III. OPTIONAL/ADDITIONAL ACTIVITIES

IV. EXPLAIN ANY SPECIFICS UNIQUE TO THE ASSIGNMENT

Signature, Faculty Member

Date

Signature, Department Head

Date

This is a workload planning document for faculty and department heads. It will be completed before the beginning of each work period. Prior to the subsequent work period the relevant numbers on course enrollment and advisees will be entered on the document to be considered in future planning.

Either party, department head or faculty member, may initiate discussion if changes covering the workload have occurred during the work periods.

Additional pages may be added as needed to clarify workload and activities.

Original Document dated October 15, 1992.

Revised Document approved November 19, 2003, by the Committee

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Record of Acceptance/Approval

Administrative/COHE Workload Committee Member names and date signed:

Mike Schliessmann	12/8/03	Christine Larson	12/11/03
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Richard Shane	12/11/03	Michael Funchion	12/11/03
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Carol J. Peterson	12/11/03	Susan Gibson	12/9/03
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Approved:

Peggy Gordon Miller, President	12/12/03
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