South Dakota State University

FACULTY WORKLOAD POLICY

JOINT ADMINISTRATIVE/COHE FACULTY WORKLOAD COMMITTEE
SOUTH DAKOTA STATE UNIVERSITY

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FACULTY (PROFESSORIAL, LECTURER, AND LIBRARIAN) WORKLOAD POLICY  
SOUTH DAKOTA STATE UNIVERSITY  
(rev 12/16/2013)

At SDSU, faculty (Professorial, Lecturer, and Librarian) responsibilities within the traditional Land-grant mission of teaching, research, assigned professional service (e.g., extension), and general service are defined by their corresponding workload. Section 5 of the Faculty Handbook, “Achieving Excellence in Faculty (Professorial, Lecturer, and Librarian) Roles,” recognizes that the lines between elements of professional responsibility may blur so that some faculty do not fall clearly into discrete categories. This document distinguishes between faculty members’ primary professional activities and responsibilities in regard to workload. The intention of this document is not to suggest that one element of an assignment is more or less important than another element. Rather, all professional activities work to complement and mutually benefit one another.

I. WORKLOAD ASSIGNMENT

Annually by fall term, faculty unit members and department heads will negotiate and agree to the assignments made by the department head and described on the Faculty Workload Description Form for the current academic and financial year. For new faculty the department head will discuss workload and performance objectives during the first two weeks of service. If changes are necessary, the workload form may be revised during each relevant semester at the initiation of the faculty or the department head. 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 the Institutional Peer Group established by COHE for resolution (Section 12.3 of the BOR/COHE Agreement). In the event that such differences are unresolved, the Provost and Vice President for Academic Affairs will unilaterally assign responsibilities for the faculty unit member.

II. FACULTY UNIT MEMBER RESPONSIBILITIES

Upon accepting an appointment, a faculty unit member assumes responsibility in at least two of the four following areas: teaching (including advising); research, scholarship, and/or creative activities; assigned professional service; and general service. The workload for full-time faculty unit members will add up to a 100% time and effort commitment from those four areas.

For purposes of conceptualization, work assignment percentages can be actualized through thinking of one week as 100%. For teaching faculty, a workload example might be 60% teaching and advising; 30% research/scholarship, and 10% service (see advising section to factor in advising loads). This roughly equates to three workdays per week for engagement in teaching and advising; one and one-half days per week devoted to research; and one-half day per week devoted to service activities. All of these responsibilities are, of course, fluid and have different time demands throughout the academic calendar. However, in planning workload equivalencies, conceptualizing teaching assignments, research projects and publication, and all levels of service through time within a week allows for a shared language and timeline for faculty and department head discussion and negotiation of the workload document.

Faculty with assignments in AES, extension (e.g., CES or outreach), or a combination of teaching, research, and/or assigned professional service will have assignments relatively equal to or greater than the funding sources associated with their position.

The standard workload unit assignment is 15 units per semester or 30 units per year for 9- month faculty, 32.5 units per year for 10-month faculty, or 37.5 units per year for 12-month faculty (Section 10.3 of the BOR/COHE Agreement).
A. **Teaching – Professorial Ranks**
Faculty unit members with the professorial rank whose primary responsibility is teaching/advising are expected to have a work effort equivalent to that needed to deliver 30 credit hours of undergraduate instruction per academic year. A 20% workload assignment corresponds to teaching a 3-credit undergraduate lecture course per semester which meets 3 hours during the week. The academic norm is that each undergraduate class involves 1 hour of work in the classroom and 2 hours outside, for an average of 9 hours per week for a 3-credit undergraduate class. For convenience of calculation, such an assignment is referred to as 3 units of workload. Therefore, a 100% instructional workload, involving no advising, would correlate to teaching five 3-credit undergraduate lecture courses per semester or having 15 units of workload (approximately equal to 45 hours of work per week) for the semester. The units of workload for other types of instruction/advising will be consistent with the required time and effort. **Professorial-rank faculty members with primarily teaching/advising responsibilities will be given a minimum of 20% release time (equivalent to 6-units per academic year) for research, scholarship, or creative activity each academic year** (Section 10.3 of the BOR/COHE Agreement). Library faculty members with professorial rank will be given a minimum of 10% release time (equivalent to one 3-credit class each academic year) for research, scholarship, or creative activity each academic year.

B. **Teaching – Lecturer Ranks**
Faculty unit members with lecturer rank are expected to deliver 30 credit hours of undergraduate instruction (teaching and advising) per academic year and are allowed to have up to 3-credit hours equivalent of service functions each academic year (Section 10.3 of the BOR/COHE Agreement).

C. **Librarian Ranks**
Faculty unit members with librarian ranks will not be required to work more than 5 calendar days per week or more than 7 consecutive days unless mutually agreed to by the administration and the faculty unit member (Section 10.4 of the BOR/COHE Agreement). Librarian faculty members with professorial/lecturer rank will have their workload adjusted to accommodate teaching, advising, and research duties.

D. **Research, Scholarship, and Creative Activity**
Units of workload will be granted to professorial faculty members for research; scholarship; mentoring and directing graduate student research [i.e., theses and dissertations] (Workload credit for courses with x87 [research credits], 798 [thesis], and 898 [dissertation]) will be given here and not under teaching and advising; and creative activity. Because undergraduate and graduate research and independent study varies by department, the workload unit credit (either in teaching or research, scholarship, and creative activity) for those courses (i.e., 498, x91, and 788) will be at the discretion of the department and will be based on the nature of the classes and department standards. A recommendation is that 50% of the workload units for 498, x91, and 788 classes be given for teaching and 50% be given for research and scholarly activity. These units of workload will be determined based on an equitable assessment of the faculty member’s activity in comparison to the credit given for instructional workload. “The quantitative expectations for activity in each area depend broadly on the mission of the university, the faculty unit member’s discipline and its role within the university, and on the specific past and present role assignments of individual faculty responsibility” (BOR Policy 4:38.1 available at, https://sdbor.edu/policy/documents/4-38.pdf).
E. **Assigned Professional Service**
Workload credit will be given for assigned professional service (e.g., extension [e.g., CES or outreach], Animal Disease Research and Diagnostic Lab, clinical sites, service labs, university librarians, departmental specific professional/administrative duties (e.g., program leader, teaching coordinator, etc.), and others). The units of workload will be determined based on the faculty member’s assigned professional service activity in comparison to the credit given for instructional workload (BOR Policy 4.38.5.C).

F. **General Service**
Workload credit will be given for professional service related to disciplines; university, college, and departmental service; and service to community, state, region, nation, or international community related to one’s expertise and skills. The units of workload will be determined based on equitable assessment of the faculty member’s activity in comparison to the credit given for instructional workload (BOR Policy 4.38.5.C).

G. **Shared Governance**
All professorial faculty unit members are expected to contribute to shared governance as part of a full-time faculty professorial appointment. This service is considered part of the General Service assignment. Lecturer faculty unit members are not subject to shared governance service obligations (Section 10.1 in the BOR/COHE Agreement), although lecturer faculty unit members can volunteer to serve on shared-governance activities. Faculty unit members holding librarian rank may be subject to shared governance obligations (Section 10.2 in the BOR/COHE Agreement).

III. **TEACHING AND ADVISING**

A. **Course Designation Values**
Each course taught by faculty unit members in the SDSU instructional program will be assigned a course designation value (workload units for delivery). The workload units for formal instruction will be determined by summing the product of the contact hours and the course designation values for the assigned courses.

*The designation value for each type of course shall be based upon the guidelines described below. In these guidelines 1 lecture class hour per week equals 1 contact hour.*

B. **Classroom Instruction**
**Undergraduate courses** taught in a lecture, seminar, discussion/recitation, workshop, and special topics orientation format have a course designation value of 1.0. (1 workload unit/1 credit/1 classroom hour, or 15 hours of class instruction equals 1 credit or 1 workload unit). Undergraduate independent study courses (x91 classes), research courses (x98 classes), etc. are not to be double counted in teaching and in scholarly activity. The workload units associated with these undergraduate courses are to be partitioned between the Teaching section and the Research, Scholarship, and Creative Activity section of the workload form. The exact partitioning will be determined by each department according to the nature of the classes and department standards.
Graduate instruction requires that the instructor must spend more time reviewing the current literature and monitoring developing knowledge bases in their discipline. **Graduate courses** (600 level or higher) taught in a lecture, seminar, discussion/recitation, workshop, and special topics orientation format have a course designation value of 1.33 (1.33 workload unit/1 credit/1 classroom hour, or 15 hours of class instruction equals 1 credit or 1.33 workload units). Thus, 4 faculty workload units of credit will be given for a typical 3-credit 600 level course that enrolls graduate students and requires graduate level preparation and instructional techniques. For dual-listed courses at the 400/500 level the workload credit may need to be adjusted according to departmental standards (e.g., 1.15 workload units for each credit of classroom instruction).

Graduate independent study courses (X91) and research report, design project, research problem, and research paper (788) are not to be double counted in teaching and in scholarly activity. The workload units associated with these graduate courses are to be partitioned between the Teaching section and the Research, Scholarship, and Creative Activity section of the workload form. The exact partitioning will be determined by each department according to the nature of the classes and department standards.

Workload credit for graduate courses with x87 (research credits), 798, and 898 [thesis dissertation] will be given in the research, scholarship, and creative activity section of the workload document according to department standards and not under teaching and advising.

A lower number of workload units may be given if the department can justify such an assignment. Such lower assignments will be reviewed by the Workload Committee upon request of the department head and/or faculty member.

C. **Laboratory/Studio Instruction**

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 for the teaching and/or coordination of laboratories/studios. Course designation numbers for teaching laboratories/studios will be assigned according to written guidelines established and uniformly applied within each department. Classification of laboratories 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 lab preparations, and staff appointed to assist in laboratory preparations. Departmental/College guidelines will be reviewed by the University Workload Committee for consistency with the University Faculty Workload Policy before the Departmental/College written guidelines are implemented.

1. **Intensive-preparation laboratories/studios** are those that require 2 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.
a) *Intensive undergraduate laboratories* should receive a workload value of 1.0 workload unit per classroom hour of instruction (e.g., 3-hour intensive undergraduate lab = 3.0 workload units).

b) *Intensive graduate laboratories* should receive a workload value of 1.33 workload unit per classroom hour of instruction (e.g., 3-hour intensive undergraduate lab = 4.0 workload units).

2. **Moderate-preparation laboratories/studios** are those that require an intermediate amount of outside preparation (approximately 1 hour outside of class for each hour in class) of the nature described above.

   a) *Moderate intensive undergraduate laboratories* should receive a value of 0.67 workload units per classroom hour (e.g., 3-hour moderate intensive undergraduate lab = 2 workload units).

   b) *Moderate intensive graduate laboratories* should receive a workload value of 0.9 workload units per classroom hour of instruction (e.g., 3-hour moderate intensive graduate lab = 2.7 workload units).

3. **Low-preparation laboratories/studios** are those in which the student’s work is conducted and evaluated primarily during the time the laboratory meets.

   a) *Low intensive undergraduate laboratories* should receive 0.5 workload unit per classroom hour (e.g., 3-hour low intensive undergraduate lab = 1.5 workload units).

   b) *Low intensive graduate laboratories* should receive a workload value of 0.67 workload units per classroom hour of instruction (e.g., 3-hour low intensive graduate lab = 2.0 workload units).

4. **Credit for coordination of multiple laboratory/studio-section courses.** A faculty member with sole responsibility for coordinating the laboratories of large courses, with multiple laboratory sections and instructors, will be given additional workload credit for serving as the coordinator (a recommended level is 1.0 workload unit for significant involvement). The workload unit value is to be negotiated between the department head and the faculty member and be based on department standards. Additional credit for laboratory coordination should be uniformly applied within a department and/or college.

5. **Unique laboratory/studio assignments.**
   An individual laboratory or studio section of a course may be assigned a higher classification in unique situations. For example, a low-preparation laboratory section taught off campus where there is not the same level of support staff as on campus to prepare laboratory materials might merit a moderate-preparation classification. Another example is a capstone course or experience that requires multiple faculty member involvement resulting in higher total workload units needed to offer the class than would normally be expected.
D. Individualized Instruction

1. Independent/Directed Study
   Independent and Directed Study courses will assign workload unit(s) based on intensity of the learning experience and number of students involved. As a general rule, workload unit will be credited to the faculty member on the basis of 0.1 unit for each 1 student credit hour. Workload for independent and/or directed study must be justified and approved by the Department Head prior to the beginning of the semester.

2. Internships, Field Experiences, and Practica Supervision
   Course workload credit assigned for undergraduate and graduate field experiences, practica, and internship supervision (except for student teaching or other internships specified by accreditation standards) will be based upon the number of credits assigned for the experience, the number of students, and the degree of faculty involvement in arranging, teaching, and/or supervising the experience. It should be noted that a greater number of credit hours is not always associated with a greater amount of faculty effort in these experiences. The following are general guidelines, which may be modified based on departmental standards.

<table>
<thead>
<tr>
<th>Student Credit Hours (SCH) Generated *</th>
<th>Number of Hours of Direct Faculty Involvement</th>
<th>Workload Units assigned**</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Intensity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 20</td>
<td></td>
<td>Negotiable</td>
</tr>
<tr>
<td>20-40</td>
<td>15-20 per semester</td>
<td>1.0</td>
</tr>
<tr>
<td>41-60</td>
<td>15-20 per semester</td>
<td>2.0</td>
</tr>
<tr>
<td>61-80</td>
<td>15-20 per semester</td>
<td>3.0</td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moderate Intensity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 20</td>
<td></td>
<td>Negotiable</td>
</tr>
<tr>
<td>20-40</td>
<td>Less than 15 per semester</td>
<td>0.5</td>
</tr>
<tr>
<td>41-60</td>
<td>Less than 15 per semester</td>
<td>1.0</td>
</tr>
<tr>
<td>61-80</td>
<td>Less than 15 per semester</td>
<td>1.5</td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Intensity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 20</td>
<td></td>
<td>Negotiable</td>
</tr>
<tr>
<td>20-40</td>
<td>Limited direct Faculty Supervision (e.g. no more than .5-2 hours/semester)</td>
<td>0.5</td>
</tr>
<tr>
<td>41-60</td>
<td>Limited direct Faculty Supervision</td>
<td>0.75</td>
</tr>
<tr>
<td>61-80</td>
<td>Limited direct Faculty Supervision</td>
<td>1.0</td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Student credit hour is computed by multiplying the number of students’ x the number of credits.
** Workload units assigned may be modified based on departmental standards
E. **Academic Advising**

1. **An Assignment in Academic Advising**
   Academic advising is considered part of instruction under BOR Policy 4:38. Advisees may be assigned to any professorial, lecturer, and librarian (with professorial/instructor rank) faculty unit member, but not every faculty member is expected to have advisees. The academic advising assignment will be clarified in the workload form.

   a) Normally, 30 undergraduate advisees equal 1 workload unit per semester based on the assumption that an adviser spends roughly an average of 1.5 hours per advisee per semester.

   b) For MS/MA Plan A, MS/MA Plan B, and PhD graduate students, 5 student advisees equal 1 workload unit per semester based on the assumption that an advisor spends roughly 9 hours per advisee per semester. For MS/MA Plan C graduate students or graduate students in highly structured graduate programs, 10 student advisees equal 1 workload unit per semester based on the assumption that an advisor spends roughly 4.5 hours per advisee per semester. Workload credit for thesis, dissertation, creative work mentoring and guidance will be given in the research, scholarship, and creative activity section of the workload document.

2. **Coordination of Advising**
   Faculty assigned responsibility to coordinate advising functions or training and mentoring others, may be given credit for these functions. Workload credit given will be consistent with the required time and effort.

F. **Teaching Workload Variations**

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

1. **Teaching Workload Adjustments**
   The basic 15 workload units of formal instruction may be decreased by a department head with the approval of the dean under special circumstances such as:

   a) **Travel**
   Workload credit may be awarded for travel that is regularly required for a classroom or practicum/clinical experience or other workload assignment at locations other than the faculty member’s home employment site to fulfill an assignment at the request of the institution. However, subject to approval of the dean, workload credit may be granted when the faculty member has volunteered for/requested an assignment that requires travel away from their normal place of work, including international travel. A general guideline (subject to department standards) in equating travel hours to faculty workload units will be 1 faculty workload unit per 4 hours of travel per week per semester.

   b) **Teaching courses which have an inherent increased time commitment over traditional courses**
   Issues of workload emerge in, but may not be limited to, distance education courses, particularly when taught for first time; new courses;
courses with a heavy service learning component; courses taught at alternate locations where normal support services are unavailable; judging team courses; capstone courses and experiences; courses with extensive technology preparation requirements; etc.

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

(1) Factors to be considered in determining the adjustment for course designation value may include, but are not limited to, the following:
   (a) Degree of interactive work and feedback;
   (b) Discovery of greater time commitment than previously anticipated and discussed;
   (c) Dual numbered courses at the 400/500 level;
   (d) Extent of assistance for the faculty member teaching the course;
   (e) Frequency of delivery of the course over preceding or subsequent semesters;
   (f) Number of concurrent delivery methods being used for the course;
   (g) Number of sites to which the course is delivered;
   (h) Number of students taught;
   (i) Team or group taught courses; and
   (j) Time for development and delivery of the course.

(2) The workload adjustment may be distributed over more than one semester, or carried forward into the next academic year.

(3) Opportunity for orientation and training in using a new technology will be provided separately from a workload adjustment.

\textbf{c) 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 their teaching duties effectively, the faculty unit member shall receive additional workload credit. Census day enrollment numbers will be used for this purpose.

A faculty unit member who feels entitled to additional workload units for large enrollments shall discuss the matter with their department head before or sometime during the semester in which the large enrollment 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 should be referred to the Institutional Peer Group established by COHE for resolution established according to the BOR/COHE Agreement (Section 12.3, 1A in BOR/COHE Agreement).

Extra workload units for large classes can be applied by adjusting the workload assignment for the semester in which the credits are earned or by adjusting the workload for one of the following 2 academic year semesters. Department workload guidelines will address class size criteria and workload unit assignments.
In emergency cases, the administration may, with the consent of the faculty unit member, pay extra compensation in lieu of workload adjustment.

**Complexity and frequency**
The complexity and frequency of course preparations may be considered in making assignments.

**Other teaching related duties**
Other teaching related duties provided they are not in conflict with the BOR/COHE Agreement.

d) **Course Preparations**
Wherever possible, a 9-month professorial faculty unit member will be assigned no more than the equivalent of 18 distinct workload units of course preparation per academic year (e.g., six 3-credit undergraduate courses or the equivalent combination of 1, 2, 3, etc. credit undergraduate courses).

When program needs of a department require it, course preparation for a faculty unit member may exceed the above guidelines, but no more than 18 distinct workload units of course preparation will be assigned in the following academic year. In those cases where a professorial faculty unit member has exceeded the guidelines per academic year, the department head will grant relief from activities described in BOR Policy 4:38.

e) **Multiple Laboratory Sections of the Same Class in a Semester**
In those classes where there are multiple laboratory sections for the same course in a semester, the workload is normally adjusted. Listed below is an example of an adjustment for a multiple section laboratory class.

1. The first lab section receives full credit according to the guidelines printed above.
2. For lab sections 2+ each subsequent lab receives 50% of the first lab work unit credits.
3. Departments have the right to alter this arrangement through justification and faculty consultation.
4. For example – If the first lab section generated 3 workload units then each subsequent lab taught will receive 1.5 workload units.

Adjustment criteria should be uniformly applied within a department and, where possible, within a college.

f) **Multiple Lecture Sections of Same Class in a Semester**
In those situations where multiple lecture sections of the same course are taught in a semester each class will receive full credit.

IV. **RESEARCH, SCHOLARSHIP, AND CREATIVE ACTIVITY**

Research, scholarship, and creative activity are fundamental components of faculty expectations and workload. Professorial ranks and librarians with professorial rank will have a clear expected part of their workload (at least 6 workload units per academic year for professorial ranks and 3 workload units per academic year for librarians with professorial rank) devoted to research, scholarship, and creative activity, and will be evaluated annually through...
their FAR on accomplishments in this area. Therefore, workload credit will be granted for those activities. Agricultural Experiment Station (AES) research workload units are to be counted towards the 6 workload unit expectation outlined in the BOR/COHE Agreement.

The number of workload units granted will be consistent with the percentage of time and effort of the individual faculty member. (Section 10.3 of BOR/COHE Agreement). An equivalent level of effort will be expected for a unit of research, scholarship, and creative activity as for a unit of instruction. Workload unit credit representing similar level of effort, but not duplicating credit given for graduate instructional and graduate curricular advising activities, shall be given for research, scholarship, and creative activity which may include scholarly activities and grant proposal writing for scholarly activities. Research, scholarship, and creative activity workload assignments should approximately correspond to or exceed the proportion of salary funded for scholarship purposes.

Graduate Research Project, Thesis, Individual Study, and Dissertation, and Undergraduate Research Direction (i.e., workload credit for courses with x87 [research credits], x98 [thesis and dissertation] will be given here according to department standards, the nature of the classes, and are not to be double counted under the Teaching section and the Research, Scholarship, and Creative Activities section) are multifaceted activities involving mentoring and guidance for research, scholarly, or creative projects. Graduate and undergraduate research training programs also vary in the role of research in the program and the linkage between the advisee’s research and the adviser’s research. Thus, departments will develop guidelines reflecting the workload expectations associated with undergraduate and graduate research projects, thesis, individual study, and dissertation direction, consistent with the flexibility provided by this workload policy.

V. ASSIGNED PROFESSIONAL SERVICE

Some university faculty members serve solely or partially in assigned professional service activities such as the SDSU Extension (CES), college/university outreach programs, the Animal Disease Research and Diagnostic Lab, service labs, clinical sites, departmental specific professional/administrative duties (e.g., program leader, teaching coordinator, etc.), and/or auxiliary services. The workload of those persons will be described in terms of workload units or percentages equal to, or greater than, their specific assignment. An equivalent level of effort will be expected for a unit of service as for a unit of instruction.

University librarians participate in a wide range of activities that range from informal instruction and instructional support to support of research, scholarship, and creative activities. These activities are collectively known as librarianship within the discipline. For the purposes of this workload policy, librarianship will be included under the classification of assigned professional service. The workload units or percentages assigned for the librarianship responsibilities will be consistent with the practice in the discipline.

Some Assigned Professional Service roles require travel to fulfill the duties of the assignment. In instances where travel is an integral part of the duties of the position, workload assignments should take travel into consideration with a fair compensation for travel time. A general guideline in equating travel hours to faculty workload units will be 1 faculty workload unit per 4 hours of travel per week per semester.

VI. GENERAL SERVICE

Faculty members are expected to participate in, and contribute to, service activities as a part of their employment responsibilities at SDSU. Workload units may be granted by the department
head with the approval of the dean for these activities consistent with the time and effort associated with the contributions. Examples of such service include:

- Leadership for or contributions to, professional organizations related to one’s university assignments;
- Other service activities that can be described in terms of specific time, effort and documented expectations/outcomes (e.g., peer observation, search committees, professional development activities, graduate faculty representative, etc.);
- Responsibility for co-curricular activities such as theatre, judging teams, musical performances, forensics, and others;
- Shared governance obligations including Faculty Senate, university committees, other committee or task force, curriculum review, review of faculty and student qualifications and expectations, academic unit programming or operations, business and decision making of the department, college, university, and other related activities;
- Special university assignments, such as preparation of reports for evaluation by accrediting associations, program review reports for the Board of Regents, special projects for the Regents or state government, and others.

VII. **ASSIGNED ADDITIONAL WORKLOAD**

If 9-month faculty unit members are assigned more than 15 workload units during an entire semester, their 15-unit assignment will be decreased by an equivalent number of workload units during the preceding semester or one of the following 2 academic year semesters (or at a later mutually agreed date). If 12-month faculty unit members are assigned more than 37.5 workload units during an entire year, their 37.5 credit assignment will be decreased by an equal number of units during the preceding year or the following year. Alternatively, with the approval of the VPAA, faculty unit members may be monetarily compensated for a mutually accepted increase in assignment over full-time. Workload assignments for 10-month faculty will be proportional.

VIII. **FACULTY WITH CLINICAL OR FIELD EXPERIENCE ASSIGNMENTS**

A. **Athletic Training.** Instruction of Athletic Training students occurs in the classroom, through clinical education, and clinical experiences. Faculty member unit assignments will be guided by the Commission on Accreditation of Athletic Training Education (CAATE). In most instances, CAATE recommends maintaining student to faculty and instructional staff ratios to allow for educational classroom and laboratory instruction and evaluation as consistent with institutional practice (www.caate.net).

B. **Medical Laboratory Science (MLS).** Faculty unit members will be guided by the National Accrediting Agency for Clinical Laboratory Sciences (NAACLS) standards on assignments and ratios in the instruction of student and clinical laboratory experiences (www.naacls.org).

C. **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 assignments and ratios in the supervision of practicum and internship experiences (www.cacrep.org).
D. **Nursing.** For clinical instruction in Nursing, faculty members will be guided by the Commission on Collegiate Nursing Education (CCNE) guidelines which specify that a workload assignment document is available to faculty members (http://www.aacn.nche.edu/ccne-accreditation/standards09.pdf). Additional guidelines from the National Organization for Nurse Practitioners guide the assignment of workload for nurse practitioner supervision of students in clinical (http://www.aacn.nche.edu/education-resources/evalcriteria2012.pdf).

E. **Pharmacy.** For clinical teaching in the College of Pharmacy, faculty unit members will be guided by the Accreditation Council for Pharmacy Education (ACPE) guidelines on workload assignment and ratios in the teaching of laboratory and clinical experiences (www.acpe-accredit.org/).

F. **Teacher Education.** In addition to the general policies in this document, workload assignments for faculty unit members in teacher education, including special methods courses, will be guided by the National Council for Accreditation of Teacher Education (NCATE) standards on teaching assignments and ratios in the supervision of practicum experiences (www.ncate.org).

IX. OTHER SIMILAR ACTIVITIES - DEFINITION

“Other similar activities” in BOR Policy 4:38.3 entitled “Statement Concerning Faculty Expectations” will include joint COHE-administration committees created by the BOR/COHE Agreement (e.g., Fringe Benefit Committee, Workload Committee, Tenure and Promotion Committee, State Agreement Management Committee, and Institutional Agreement Management Committee).

X. OFFICE HOURS AND AVAILABILITY TO STUDENTS/CLIENTS/COLLEAGUES

Faculty unit members will establish sufficient office hours to be available for student conferences and other client and colleague 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. Faculty will also make reasonable efforts to respond to student inquiries via email in a timely manner.

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 workload units per semester or with VPAA permission, the faculty member may be compensated for the additional workload. The schedule and location will be discussed with the faculty member to facilitate performance of the workload. (See also Teaching Workload Variations relative to travel time.)

XII. OVERLOAD, SUMMER, AND SELF SUPPORT APPOINTMENT LIMITS

Overload, summer, and self-support appointments will be consistent with the BOR/COHE Agreement Section 19.5 which states in part, “Faculty unit members may not be assigned overload, summer term, or self-support courses that would interfere with completion of other assigned responsibilities. For purposes of this section, summer term and self-support classes include only courses assigned in addition to a faculty unit member’s base course load. The administration may only offer contracts for overload or self-support courses to faculty unit members whose primary responsibilities are instructional; such additional instructional
Documented academic carryover has a one-year timeframe. For example, if a faculty member is assigned 17 units during fall semester, a reduction of workload units to 13 should occur either spring semester or the following fall semester (or some combination of the 2). If this is not accomplished, payout must occur to the faculty member to remove the carryover credit. Academic credit carryover resulting in payout will require approval of the dean and the VPAA.

XIII. CONSULTING AND PRIVATE PRACTICE

SDSU encourages professorial and librarian faculty members to participate in outside professional activities that contribute to their professions, to the broader communities, to the expansion of economic and cultural resources in SD, and to the SDBOR’s public service mission. Outside engagement is an important part of the academic community and supports our need for and enhances scholarly excellence. Consulting and private practice experiences allow faculty members to maintain contact with professional colleagues, keep current with research priorities and advancements, and develop contacts with private and government entities. This knowledge and skill helps faculty prepare students for various career options, helps the faculty members to better compete for research grants, and/or benefits SDSU and SD (Section 10.5 of the BOR/COHE Agreement).

1. Consulting and private practice are professional activities where a fee-for-service with a third party is employed.
2. Full-time professorial and librarian faculty must apply in writing for such an arrangement and have it approved by their supervisors before starting consulting or private practice activities.
3. Consulting and private practice activities cannot exceed 4 days in a single month and must not interfere with regularly scheduled instructional, advising, assigned professional service, research or other full-time responsibilities to SDSU.
4. Faculty members need to follow the rules established in BOR Policy 4.34 and 4.35 as they relate to consulting and private practice (Section 10.5 of the BOR/COHE Agreement).
5. Faculty members involved in paid consulting and private practice will annually report in writing to their supervisor the number of days engaged in consulting and private practice (including weekends and holiday) and the names of the outside entities that paid the faculty unit member for the consulting or private practice work. If more than one outside entity provided financial payment, then the number of days for each employer will be given. This yearly report is to be submitted at the end of the spring semester.

XIV. FACULTY WORKLOAD FORMS

The Faculty Workload form for professorial and clinical faculty is shown on pages 17-18 of this section. The Faculty Workload form for librarians is shown on pages 19-20 of this section. The Faculty Workload form for lecturer faculty is shown on pages 21-22 of this section. These forms are to be completed within two weeks of starting a new position or annually in the fall term for continuing faculty.
**Professorial & Clinical Rank Faculty Workload Description Form**

Name: 
Department: 
Academic Rank: 

**Time Period:** AY2017

**Workload Units:** 37.5

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**I. REGULAR WORKLOAD**

### A. Teaching

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<th>Course Prefix</th>
<th>Course Number</th>
<th>Course name or Other teaching Assignment</th>
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</table>

**Workload Unit Subtotal:** -

### B. Advising

Advising Undergraduate Students, 30 advisees per semester = 1 workload unit (WLU), for Academic Advising (Plan C, Highly Structured), 10 advisees per semester = 1 WLU, for Academic Advising (Plan A, Plan B, PhD) 5 advisees per semester = 1 WLU

<table>
<thead>
<tr>
<th></th>
<th>Avg. Num. Students/Semester</th>
<th>Fall Work Load Units</th>
<th>Spring Work Load Units</th>
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<td>Academic Advising (Plan A, Plan B, PhD) Graduate Students</td>
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</table>

**Workload Unit Subtotal:** -

### C. Research, Scholarship or Creative Activity

(includes AES, graduate and undergraduate research, thesis, or dissertation mentorship attributable to research by departmental guidelines). Professorial faculty must have a minimum of 5 workload units per year.

**Workload Units:**

<table>
<thead>
<tr>
<th>Fall</th>
<th>Spring</th>
<th>Summer</th>
<th>Total</th>
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- 17 -
D. Assigned Professional Service in Extension or Outreach, Clinical Sites, Service labs, Library, Departmental Specific Professional/Administrative Duties, or Auxiliary Service Units

Workload Units: - - - - -
       Fall  Spring  Summer  Total

E. General Service Activity: (University and Professional Discipline related)

Workload Units: - - - - -
       Fall  Spring  Summer  Total

F. Credit for Previous or Future Over-Assignment. Workload carryover cannot extend for more than 1 academic year. If carryover cannot be accommodated, then payout should be given to the faculty member to remove the carryover credit.

Indicate Semesters: 
Units: - - - - -
       Fall  Spring  Summer  Total

FACULTY WORKLOAD UNIT TOTAL
* 15.0 workload units is considered a full-time 100% semester workload assignment and 30.0 workload units is a full-time assignment for a 9-month academic year. 32.5 workload units is the 100% workload assignment for faculty on 10-month appointments. 37.5 workload units is the 100% workload assignment for faculty on 12-month appointments.

II. CURRENT OVER-ASSIGNMENT

Method of Compensation (Release Time or Payment**)

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<tr>
<th>Method of Compensation</th>
<th>Workload Units</th>
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** Payment requires Dean’s and VPAA’s approval

III. EXPLAIN ANY SPECIFICS UNIQUE TO THE ASSIGNMENT

______________________________  ______________________________
Signature, Faculty member       Date

______________________________  ______________________________
Signature, Department Head      Date

This is a faculty workload assignment planning document for faculty and department heads and will be completed and negotiated before the beginning of each work period (i.e., the start of each semester), or annually at FAR evaluation, or within 2 weeks of starting employment. 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 faculty workload assignment have occurred during the work periods.

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 THE INSTITUTIONAL PEER GROUP ESTABLISHED BY COHE FOR RESOLUTION (SECTION 12.3 OF THE BOR/COHE AGREEMENT).

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

Library Rank Faculty Workload Description Form

Name

Department
H. M. Briggs Library

Academic Rank

Date

Time Period:
AY2017

Workload Units*
37.5

This section will automatically compute as workload units are added to sections I. A-F.

Percentage of time assigned to each role based on faculty workload units. Letters refer to sections that follow.

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<th>Total</th>
<th>Fall</th>
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</table>

I. REGULAR WORKLOAD

A. Research, Scholarship or Creative Activity (if relevant - not required)

Workload Units: - - - -

B. Assigned Professional Service as Librarian or other.

Workload Units: - - - -

C. General Service Activity: (University and Professional Discipline related)

Workload Units: - - - -

D. Credit for Previous or Future Over-Assignment. Workload carryover cannot extend for more than 1 academic year. If carryover cannot be accommodated, then payout should be given to the faculty member to remove the carryover credit.

Indicate Semesters: - - - -

Workload Units: - - - -

FACULTY WORKLOAD UNIT TOTAL

* 15.0 workload units is considered a full-time 100% semester workload assignment and 30.0 workload units is a full-time assignment for a 9-month academic year. 32.5 workload units is the 100% workload assignment for faculty on 10-month appointments. 37.5 workload units is the 100% workload assignment for faculty on 12-month appointments.
II. CURRENT OVER-ASSIGNMENT

<table>
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<th>Method of Compensation (Release Time or Payment**)</th>
<th>Units</th>
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</table>

** Payment requires Dean's and VPAA's approval

III. EXPLAIN ANY SPECIFICS UNIQUE TO THE ASSIGNMENT


Signature, Faculty member  Date

Signature, Department Head  Date

This is a faculty workload assignment planning document for faculty and department heads and will be completed and negotiated before the beginning of each work period (i.e., the start of each semester), or annually at FAR evaluation, or within 2 weeks of starting employment. 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 faculty workload assignment have occurred during the work periods.

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 THE INSTITUTIONAL PEER GROUP ESTABLISHED BY COHE FOR RESOLUTION (SECTION 12.3 OF THE BOR/COHE AGREEMENT).

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

Lecturer Rank Faculty Workload Description Form

Name

Department

Academic Rank

Date

Time Period: AY2017

Workload Units: 37.5

This section will automatically compute as workload units are added to sections I. A-F.

Percentage of time assigned to each role based on faculty workload units. Letters refer to sections that follow.

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<th>Summer</th>
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<td>Advising (B)</td>
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<td>General Service (E)</td>
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I. REGULAR WORKLOAD

A. Teaching

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<th>Course name or Other teaching Assignment</th>
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Workload Unit Subtotal: -

B. Advising

Advising Undergraduate Students, 30 advisees per semester = 1 workload unit (WLU), for Academic Advising (Plan C, Highly Structured), 10 advisees per semester = 1 WLU, for Academic Advising (Plan A, Plan B, PhD) 5 advisees per semester = 1 WLU

<table>
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<tr>
<th>Role</th>
<th>Avg. Num. Students/Semester</th>
<th>Fall Work Load Units</th>
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Workload Unit Subtotal: -
C. General Service Activity: University and Professional Discipline related

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D. Credit for Previous or Future Over-Assignment. Workload carryover cannot extend for more than 1 academic year. If carryover cannot be accommodated, then payout should be given to the faculty member to remove the carryover credit.

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<th>Indicate Semesters</th>
<th>Units</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>Fall</td>
<td>Spring</td>
<td>Summer</td>
<td>Total</td>
</tr>
</tbody>
</table>

FACULTY WORKLOAD UNIT TOTAL

* 15.0 workload units is considered a full-time 100% semester workload assignment and 30.0 workload units is a full-time assignment for a 9-month academic year. 32.5 workload units is the 100% workload assignment for faculty on 10-month appointments. 37.5 workload units is the 100% workload assignment for faculty on 12-month appointments.

II. CURRENT OVER-ASSIGNMENT

Method of Compensation (Release Time or Payment**)

<table>
<thead>
<tr>
<th>Workload Units</th>
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<tr>
<td></td>
<td>Fall</td>
<td>Spring</td>
<td>Summer</td>
<td>Total</td>
</tr>
</tbody>
</table>

** Payment requires Dean's and VPAA's approval

III. EXPLAIN ANY SPECIFICS UNIQUE TO THE ASSIGNMENT

__________________________________________  ______________________________
Signature, Faculty member                    Date

__________________________________________  ______________________________
Signature, Department Head                    Date

This is a faculty workload assignment planning document for faculty and department heads and will be completed and negotiated before the beginning of each work period (i.e., the start of each semester), or annually at FAR evaluation, or within 2 weeks of starting employment. 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 faculty workload assignment have occurred during the work periods.

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 THE INSTITUTIONAL PEER GROUP ESTABLISHED BY COHE FOR RESOLUTION (SECTION 12.3 OF THE BOR/COHE AGREEMENT).

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

Record of Acceptance/Approval

Administrative/Institutional Workload Committee Member names and date signed:

Doug Malo  
Date  
Meredith Redlin  
Date  
Robert Watrel  
Date  
Songxin Tan  
Date  
Laurie Nichols  
Date  
Charles Vollan  
Date  

Approved:

David L. Chicoine, President  Date