

Workload Reform Proposals Packet
Mercer University
Submitted by Faculty Development, Faculty Welfare Committees
Spring 2009

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I. What is this?

This packet presents three proposals for workload reform in CLA. These proposals are candidates for reform: each accomplishes in some way a workload reallocation for some or all CLA faculty. This packet is intended to present each proposal on an equal footing, and none as favored over others – which proposal is ultimately implemented (if any) will be up to the faculty – this packet is intended to supply the faculty with a range of reform options and ideas. Some of these proposals have origins in CLA, others are inspired by workload policies at other schools. For the purposes of this project, each of these proposals should be considered on their own merits, and not saddled with previous, unrelated baggage and non-workload-related reforms. The proposals that have origins in CLA have been modified somewhat so that they are primarily *workload* reform proposals, rather than curricular reforms; they may differ in significant ways from previous incarnations. Accompanying this document is a packet of appendices, containing supporting material and more detail on some plans.

II. Motivations for the workload reform project

During the 2007-08 academic year, Mercer University as well as CLA developed new 10-year strategic plans. The University strategic plan calls for a reduction in faculty teaching load (in goal 2: see Appendix II), and the CLA plan specifies a goal of a standard 18-hour teaching load (in strategy 1: see Appendix III). Further, solicitations from new administrators for more faculty involvement (in admissions, development, et. al.), and new proposals such as the four-year guarantee suggest that faculty responsibilities may need to diversify if we are to achieve long-term strategic goals for Mercer.

An additional motivation for workload reform manifested itself in September 2008, with the release of the aggregate CLA faculty responses to the HERI online study conducted Spring 2008. These indicated some troubling results regarding faculty satisfaction, and it was perceived by the workload subcommittee that workload stresses at Mercer may be directly responsible for some negative responses. Of particular concern is a 24% decrease in overall job satisfaction since 1997, an increase in job stress from teaching load (up to 69% having some or extensive stress about this), and 46% of the faculty who said that if they had to do it all over again, they would *not* come back to Mercer. See the *Workload Diary Report*, Appendix II: Workload Satisfaction in CLA, which evaluates the HERI results and compares them with the results of a similar survey conducted at Mercer in 1997.

III. Workload Reform Project Timeline

In March 2008, in response to and as part of strategic planning, the Faculty Welfare and Faculty Development committees initiated and hosted a faculty forum on workload, in order to start discussions about how CLA might start specifically developing a plan to implement the desired teaching reduction. Over the summer, a subcommittee comprised of members of each committee met several times to put together such an implementation plan. The following timeline was worked out:

Fall 2008: Conduct a workload diary survey to gain a more accurate accounting of workload allocation among the faculty (before this survey, the only workload

- information we had was anecdotal, casually estimated, and even then, was only provided by those who described their workload concerns in public meetings).
- Winter 2009: Write and present a report based on the diary study and factoring in survey data from the Spring 2008 HERI online study.
- Winter 2009: In conjunction with the Deans' offices, develop several potential workload reform plans for consideration by the faculty. These are those plans.
- Spring 2009: Conduct the annual Faculty Development reading group on the topic of workload and workload reform. Review and discuss the potential workload reform proposals in detail.
- Spring 2009: Conduct a faculty forum in which workload reform proposals are discussed, and preferred candidate(s) selected.

IV. Acknowledgments

A number of people contributed to this project at various times and stages. Apologies to any who have been left out.

Research on workload issues and workload policies: Craig Coleman, Yosalida Rivero-Zaritsky, Creighton Rosental

Workload reform proposals subcommittee: Gary Richardson, David Nelson, Dale Moore, Creighton Rosental

Draft workload reform proposals packet: Creighton Rosental

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V. Workload Reform Proposals

A. Proposal One, "4 credit-hour": Shift to 4-credit hours for standard courses

i. Synopsis of plan

Currently the "standard" CLA course is 3 credit-hours. The proposal calls for a shift to a 4 credit-hour standard. For a faculty member teaching 21 credit-hours over 6 or 7 courses, the teaching load would be reduced to 20 credit-hours over 5 courses. A reduction to 18 credit-hours for all faculty would require additional resources.

ii. Implementation of plan

Who gets a teaching reduction?

Because the reform changes the curricular structure, every faculty member teaching in CLA would be affected as soon as the reforms were implemented.

What would need to be done?

Some of the changes needed would include:

- All curricular requirements would need to be re-examined and adjusted, including the Core, Gen Ed, Great Books, Majors, Minors, Concentrations, Departmental offerings, etc.
- Because number of courses offered each semester would decline somewhere between 16-28%, each department would need to adjust their course offering schedules.
- Weekly course calendars would need to be adjusted for a 4 credit-hour schedule.
- Individual courses might need to be adjusted to accommodate the additional credit-hour.

Timeline for implementation?

Given the scope of the changes necessary, if faculty committee responsibilities were oriented towards implementing this reform, departments and faculty were motivated and worked hard towards their respective program and course offerings, it might be ready for the 2011-12 academic year, though that seems very optimistic.

iii. Resource costs of plan

The time and effort to implement the curricular reform would be significant, but once the reform was implemented, all faculty would receive a reduction in courses taught without any further resource costs. However, to achieve the strategic goal of 18 credit-hours, teaching workload would still need to be reduced by 10% overall, or an increase in faculty by approximately 10%, or roughly 11.5 new FTE.

iv. Scalability of plan

The plan, once implemented, immediately scales to 100% of the faculty.

v. Pros and Cons

Pros:

1. The plan calls for a complete curricular overhaul, giving CLA the opportunity to rethink and update its academic offerings.
2. It achieves a workload reduction for all faculty, all at once, with no additional resources needed (except to get to 18 credit-hours).
3. Reduces number of courses taken by students, which may improve focus and performance, and eliminates “bloat” in the student’s education, if there is any (e.g., upper-division students taking lower-level courses to satisfy total credit requirements).
4. Extra credit-hours for many courses could be used to improve student engagement and learning (e.g. discussion or group time, writing intensive courses, et. al.), and enhance Mercer distinctives (e.g. service learning), or manifest other pedagogical benefits (e.g. integrating technology).

Cons:

1. The plan calls for a complete curricular overhaul, forcing CLA to reform everything.
2. Diminishes number of courses offered, limiting student educational alternatives and opportunities to teach more specialized courses. This would also result in an average 5% increase in course enrollment limits.
3. There may be difficulties in coordinating curricula with other Mercer schools who have students taking courses in CLA.

vi. Plan details

In 2003, Dean Fallis presented a white paper promoting a new curricular structure in CLA. That proposal involved a change to a 4 credit-hour standard, but was first and foremost driven by a desire for curricular reform. In contrast, *this proposal* is intended to be a *workload*-reform proposal, and hence does not recommend particular curricular changes (those would be left up to the faculty who would implement this reform). The dean's white paper can be found in Appendix IV.

B. Proposal Two, "13%": Adjust enrollment distribution to achieve a 13% reduction in sections offered

i. Synopsis of plan

Dale Moore has calculated that decreasing the CLA teaching assignment from 21 to 18 credit-hours without adding new faculty would require decreasing the total number of sections offered by about 13%. This plan calls for a careful examination of the CLA courses offered and perhaps curricular structure in order to find opportunities to improve instructional efficiency so that the decrease in course offerings does not negatively impact the pedagogical mission or quality of education in CLA. There are two primary models for improving efficiency:

1. Consider low-enrollment upper-division courses as a high educational priority. These courses would generally not be part of the 13% that are cut. The cuts would then take place by consolidating lower-division courses, thereby increasing enrollments in them.
2. Consider courses at all levels to have fairly equal priorities. Thus, it would be important for lower-division courses and upper-division courses to have similar investments in teaching time, and similar enrollments. This could be achieved by consolidating upper-division courses, thereby increasing enrollments in them. It could also be achieved by cutting some lower-division courses and directing students to take existing upper-division courses (increasing enrollments in those courses).

ii. Implementation of plan

Who gets a teaching reduction?

In principle, the teaching reduction would apply to all faculty. In practice, however, unless teaching resources are reallocated (i.e. shifted from one department to another), or student enrollment patterns are significantly shifted (by, for example, changes in curricular structure (e.g. themes)), teaching reductions can only be allocated where instructional efficiency can be improved. Some departments may already be maximally efficient (in other words, increasing class sizes or eliminating courses would significantly diminish educational quality), and thus increased efficiencies would not accrue to those departments. However, there is no reason in principle that existing resources could not be shifted towards such departments, or such departments be given first priority for new hires.

What would need to be done?

1. One of the two instructional efficiency models would need to be approved as a goal.
2. Further study following on the CLA Instructional Efficiency Report (see Appendix V) would be needed to find specific teaching inefficiencies to be addressed.

3. Inefficiencies in some courses could be resolved simply by consolidating courses, with some courses (or sections) no longer offered. Non-workload instructional efficiencies may require curricular changes which help direct students into currently under-enrolled courses.

Timeline for implementation?

1. Faculty adoption of an efficiency model would take some discussing, but could presumably be voted on Fall 2009.
2. Study for inefficiency targets could be done through the summer and Fall semesters and be ready by the end of Fall 2009.
3. Some course efficiencies (and teaching reductions) could be achieved immediately simply by not offering some listed courses Spring 2010. Fully implementing the changes to achieve instructional efficiency (and to adjust to new departmental offerings and teaching schedules) would probably take a few years, however. Other considerations or priorities could delay full implementation indefinitely.

iii. Resource costs of plan

If all departments are equally inefficient, then teaching reductions can be achieved with no additional resources. If, on the other hand (and what is more likely), some departments are maximally efficient, then either: resources would need to be shifted from those departments realizing the greatest efficiency gains to those who are currently efficient, or new faculty would need to be hired. The former solution may not always be viable (e.g., an FTE English professor whose time is freed up by increased efficiencies cannot simply help out in Chemistry), so teaching reductions in some cases would only be achieved by addition of new resources. How many new faculty would be required for an across-the-board teaching reduction cannot be determined until a full and detailed study of instructional efficiency is completed.

iv. Scalability of plan

With the caveats mentioned in section iii, the plan could, in principle, scale to all faculty. However, because implementation can be phased in over an indefinite time-span, it may be the case that teaching reductions would not be available for all faculty for some time. In such a scenario, an interim system of allocating reductions would need to be implemented.

v. Pros and Cons

Pros:

1. For the most part, the teaching reductions can be achieved without addition of new resources.
2. Resource allocation would align more closely with demand.
3. Programs that seek to improve efficiencies will likely need to rethink their curricular offerings, course schedules and teaching assignments.

Cons:

1. Increasing instructional efficiency requires increasing enrollments in some classes and consolidating courses. Diminishing the number of opportunities students have for

- courses to be taken and increasing (some) class sizes might harm educational quality more so than the benefits that accrue from a teaching reduction.
2. Some departments with low efficiencies might permanently be diminished, with resources re-allocated to programs with a higher demand. There may be pedagogical value in preserving “low-efficiency” programs, and not allocating our resources according to demand.
 3. Programs that seek to improve efficiencies will likely need to rethink their curricular offerings, course schedules and teaching assignments.

vi. Plan details

For more discussion and data on the 13% proposal, on the current teaching effort, and on the two efficiency models, see Dean Moore’s “CLA Instructional Efficiency Report” in Appendix V.

C. Proposal Three, “15+X”: Faculty members, in coordination with their departments and the Dean, put together yearly workload plans based on a baseline expectation of service, scholarship and teaching 15 credit-hours “plus” either more teaching, more service, or more scholarship.

i. Synopsis of plan

Currently 32 of 107 of faculty (30%) with appointment letters from CLA have a stipulation in their letters some sort of workload reallocation in which teaching load is reduced in exchange for increased effort in scholarship (6) or service (26). Additionally, during academic year 2008-09, some faculty were granted teaching reductions for increased efforts in scholarship or service as part of Dean Fallis’ charge to departments to “find teaching reductions.” These reductions are not permanent and are handled on an ad hoc, case-by-case basis.

Currently the standard teaching load requirements are approximately:

Teaching: 21 credit-hours

Scholarship 3-6 credit hours equivalent

Service: 2-3 credit-hours equivalent

Teaching appointments are then “21-X”, in which the standard 21 credit-hour teaching obligation is reduced and the scholarship and/or service obligations are increased a proportionate amount. The CLA faculty workload policy is included in Appendix VI.

This proposal recommends systematizing workload reductions, creating an “15+X” teaching load appointment, in which minimum workload requirements are specified by workload policy, and additional workload distributions are worked out at the departmental level and approved by the Dean. Under this proposal, the standard teaching load requirements would, for instance, be:¹

	Standard requirement	Example 1: Current “typical” teaching load	Example 2: less teaching, more scholarship	Example 3: much less teaching, much more service
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¹ This model has minimum requirements of 15 credit-hours for teaching and 3 for scholarship and service, and 27 total, but these values would need to be worked out by the faculty as part of a detailed plan.

Teaching	15+X	15+6	15+3	15+0
Scholarship	3+Y	3+0	3+3	3+0
Service	3+Z	3+0	3+0	3+6
Total	27	27	27	27
Ratio: teaching-scholarship-service		78-11-11	67-22-11	56-11-33

Each faculty member would be required to teach (by this sample standard) 15 credit-hours, and do scholarship and service each at 3 credit-hour equivalents. In addition, they would craft (in consultation with their department, and approval by the Dean), a workload distribution of 6 additional credit-hour equivalents. Example 1 is roughly the workload of the current typical faculty member (the ratio aligns fairly closely with workload trends from the workload diary survey). Example 2 is the equivalent of a teaching reduction for scholarship, and example 3 is the equivalent of a two course teaching reduction for service.

Regardless of what the actual workload values (15, 3, 3, 27) turn out to be, the policy would be implemented in the same way:

- Each faculty member would submit a workload plan with proposed teaching, scholarship and service loads for the following year. Proposed values of X, Y, and Z would be justified by the faculty member in the proposal.
- Each department would collect its faculty members' proposals and put together a workload package for the department. The package would need to cover the minimum course offerings needed by the department, IDS contributions, and service to the college/university. The Dean may additionally have a "pool" of reductions that could be appealed for by the department. Departments may then adjust faculty workload proposals to cover these minimum needs, in some cases "rejecting" a faculty member's proposal for reduced teaching load.
- The Dean would approve each department's workload plan and each faculty member's personal workload allocation.

ii. Implementation of plan

Who gets a teaching reduction?

As specified in the synopsis, any faculty member is eligible for a teaching reduction at any time. In practice, however, only some faculty will receive requested teaching reductions, depending on departmental, IDS and service needs (it may also be the case that some faculty *don't* request a teaching reduction). Currently 30% of faculty receive teaching reductions through their appointment letters, which does not include the additional reductions made through the recent department-level reduction initiated by Dean Fallis. If these resources were to remain available, we could expect at least 30% of the faculty to have a reduced teaching load in any given year.

What would need to be done?

- Faculty would need to decide on workload minimums and overall workload targets (in the sample above: 15, 3, 3, 27).

- Departments would need to assess minimum teaching needs and IDS and service requirements in order to develop a baseline department workload. They will also need to develop policies for adjusting the workload proposals of individual faculty members (in other words, policies for who gets their proposal approved and who doesn't). Departments will also need to establish guidelines for scholarship and service credit-hour equivalences.

Timeline for implementation?

Appointment letters for 2009-10 will be sent out before this plan could be implemented, but there's no reason it couldn't be implemented for the 2010-11 academic year. Individual faculty proposals and departmental workload plans could be proposed and approved along with the schedule of courses for the 2010-11 academic year.

iii. Resource costs of plan

The plan has no additional resource costs: it merely systematizes the current teaching reduction approach. However, were *all* faculty to become eligible simultaneously for a teaching reduction to a maximum 18 credit-hours, additional resources would be required. Assuming no other proposals were adopted, Mercer would need to hire approximately 11.5 new faculty to achieve an across-the-board maximum teaching load of 18 credit-hours.

iv. Scalability of plan

The plan is eminently scalable: every new hire adds an equivalent amount of resources into the departmental pool. 18 credit-hour teaching loads could gradually grow from roughly 30% of the faculty to 100% over an indefinite period of time, as new faculty were gradually hired.

v. Pros and Cons

Pros:

1. Has no initial resource costs, this simply rationalizes workload allocation policies.
2. Relatively easy to implement, and requires no curricular changes.
3. Decision-making and resource allocation made at the departmental level: closer to where needs are identified, and relative values of teaching, scholarship and service better estimated.

Cons:

1. Requires additional faculty in order to reduce the teaching load for all faculty to 18 credit-hours.
2. Department-level decisions for allocation of resources could be a source for intra-departmental strife.

vi. Plan details

This form of workload policy was implemented by Boise State. Discussion of the policy and the policy itself can be found in Appendix VII.

vii. Variant I: a points-based version

A variant on the above proposal is a points-system. A table is developed in which all types of work are assigned some number of points (see Appendix VIII for an example). Faculty are then required to do work satisfying some minimum number of points each year. As with the proposal

above, faculty submit workload proposals to their departments, in which each faculty member proposes a workload distribution for the year. The department then develops an overall workload plan, adjusting individual faculty members' plans as needed. The Dean approves the final workload plan. Implementation, resource impact and scalability are all roughly equivalent to the "15+X" plan, though details, of course, would differ somewhat.

viii. Variant II: a non-quantitative version

Rather than a "15+X" or "points-based" quantitative approach to workload, a non-quantitative version could also be implemented. This version of the proposal would not specify quantitative workload targets, but instead departments would determine the teaching load of its faculty for the upcoming year based on qualitative considerations. Departments would still have policies for workload allocation, and they could, depending on the plan, leave responsibility for scholarship and extra-departmental service up to the individual faculty members or factor those into departmental teaching load decisions. For more discussion and details on workload policies along these lines, see Appendix IX.

ix. Variant III: a time bank

Compatible with either the "15+X" plan or the "points-based" variant is the establishment of a time bank. Under either plan, workload policies could assume a standard workload of 18 credit-hours. If in any year a faculty member teaches more than 18 credit-hours, those credit-hours are "banked." The bank could serve one, or both of two purposes:

1. The time bank is used to establish an objective means of determining who has highest priority for approval for their teaching-reduced workload plan. For instance, suppose four faculty (A, B, C and D) submit plans calling for reduced teaching loads, but departmental needs allow only one faculty to receive the reduction, say A. Faculty B, C, and D teach 21 hours, and each get 3 hours banked. The next year, the same four faculty apply for reduced loads, but A is at the bottom of the list (no time banked), and B is given the reduction. After 2 years, bank totals are: A-3, B-0, C-6, D-6.
2. The bank could also be used to secure sabbaticals. A policy could be established where faculty who have, say, 15 or more hours in the bank (equivalent to 5 years without any teaching reduction) are entitled to a sabbatical.