ARTICLE [x]. WORKLOAD AND OVERLOAD COMPENSATION

Section 1. Definition of Full-Time Faculty Workload

The primary responsibilities of all faculty members are teaching, professional development, and service. Teaching encompasses lectures and labs as well as activities such as working with students outside of class, posting and maintaining appropriate office hours, course and curriculum planning, and like activities. Professional development includes maintaining currency in the discipline taught as well as other research appropriate to the faculty member’s expertise and appointment. Service includes departmental and institutional committee work, student support and retention activities, and service in professional organizations or other professionally-related public service.

To encourage excellence in and balance between teaching, service, and professional development, instructional and non-instructional workload must be clearly codified while leaving room for program- and department-specific needs as determined by department chairs.

Faculty members on nine-month (9-mo) appointments have a 39-week appointment period. They are not hourly employees, but their assignments shall be structured in such a manner that it is reasonable for a competent individual to fulfill the minimum requirements needed for reappointment, promotion and tenure over the full 39-week appointment period. The nature of faculty work prevents one from evenly spreading out the time commitment across the year. Some weeks will entail more time than a standard workweek; some weeks will entail less. When classes are not in session, a faculty member must be able to take advantage of the reduced demands to focus on course preparation, professional development, and scholarship.

Contractual work done outside of a 9-month contract should be calculated on a pro-rated basis consistent with this article. This applies to faculty with contracts between 9 and 12 months.

Full-time faculty workload is defined as 36 workload units (WLU) for both tenured/tenure-track (TT) faculty and non-tenure-track (NTT) faculty on 9-month/39-week contracts and regardless of modality or campus location. Those 36 WLU shall encompass both instructional and non-instructional work.

Department chairs, in consultation with faculty, shall determine how workload is assigned to faculty each academic year or, as needed, each term. As part of this, if a chair determines that a faculty member needs to spend more time on non-instructional work—whether service or professional development—in a given term or academic year, the chair will work with the faculty member to fairly determine what that non-instructional work should look like and how it will be quantified. However, no faculty member will be required to work beyond their annual contractual 36 WLUs, and if additional funding is needed to either compensate faculty for overload instructional or non-instructional work or to hire additional full-time or contingent faculty in a given term or academic year, the Employer shall provide that funding.

Section 2. Workload Minima for Tenure-Track and Tenured Faculty

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Workload minima are guarantees to both a faculty member and a department. While departments may differ in how much their faculty spend on different aspects of workload, all faculty across the university will share the workload minima, according to their type of appointment.
Faculty with heavy instructional workloads shall be guaranteed time for service and professional development, which are necessary for tenure and promotion; similarly, faculty with heavy non-instructional workloads shall be guaranteed to spend the majority of their time on instruction, in keeping with the character of Oregon Tech as a teaching institution.

The following workload minima are mandatory for tenure-track and tenured faculty:

- Instruction or Librarianship – at least 60% per academic year
- Service Duties – at least 10% per academic year
- Professional Development – at least 10% per academic year

Exact apportioning of the remainder of faculty time will be determined at the departmental level according to departmental needs; this will be agreed upon by both the department chair and the individual faculty member. (For example, if a department has high service needs one year, a tenure-line faculty member may do up to 10.6 WLU (30% of total workload) of service that year while still doing 21.6 WLU (60% of total workload) of instruction and 3.6 WLU (10% of total workload) of professional development. Similarly, if a department has higher instructional needs one year, a faculty member may do up to 28.8 WLU (80% of total workload) of instruction while still fulfilling the minimum 3.6 WLU (10% of total workload) each in service and professional development.)

Section 3. Workload Minima for Non-Tenure-Track Faculty

The following workload minima are mandatory for non-tenure-track faculty:

- Instruction or Librarianship – at least 80% per academic year
- Service Duties – at least 5% per academic year
- Professional Development – at least 5% per academic year

Again, exact apportioning of the remainder of faculty time will be determined at the departmental level according to departmental needs; this will be agreed upon by both the department chair and the individual faculty member. The NTT faculty member could do up to an additional 3.6 WLU of instruction, service, or professional development.

Section 4. Formulae for Quantifying Instructional Workload

In recognition that all faculty have expert knowledge and, as such, faculty instruction is equally valuable across disciplines, instructional workload shall be quantified according to the following guidelines for all course prefixes and independent of enrollment:

- 1 lecture contact hour = 1 workload unit (1 WLU)
- 3 lab contact hours = 2 workload units (2 WLU)

These formulae assume that instructional workload includes both in-class and out-of-class time at a ratio of 1:4, where 1 lecture hour (50 mins) requires, on average, three hours of preparation time (to include both lecture preparation and grading) and one hour (to include both student contact time, virtual or in-person, and sundry instructionally-related email tasks). For example, 9 WLUs of
instruction requires approximately 36 hours of labor in a work week. (However, as noted above, some work weeks may require more time and some may require less time; faculty are not hourly employees, and this contract assumes that these variations work themselves out over the course of an academic term.)

Department chairs may make decisions about offering classes based on enrollment, but enrollment shall not affect a faculty member’s workload. Faculty members shall not be penalized for teaching essential courses that advance students toward graduation; if a course is judged essential to offer, a faculty member shall receive the same amount of instructional workload regardless of enrollment.

Librarianship
In recognition that Library faculty workload is unpredictable and inconsistent, Librarianship (as equivalent to instructional workload) cannot be mapped to lecture hours but instead may include some or all of the following activities: Fostering learning environments that promote information competencies, inquiry and analysis, and critical thinking while encouraging lifelong learning; contributing to the design, improvement, and assessment of courses, curricula, and research activities; managing, developing, and creating the libraries’ collections, as well as facilitating intellectual and physical access to the libraries’ collections that foster diverse perspectives.

Externship
For an in-load externship assignment, faculty shall receive 1-1 credit hours to workload unit basis.

Summer/Off-Term
Instructional workload assigned during the Summer (or “off” term) faculty shall receive a percent equivalent to their annual base salary: salary divided by total annual WLU = pay per workload unit (WLU).

Section 5. Formula for Quantifying Non-Instructional Workload
Non-instructional workload, including both service and professional development, shall be quantified according to the following formula:

10 hours of non-instructional work = 1 workload unit

Quantifying Service
For service duties whose work occurs primarily in meetings, workload shall be calculated based on approximate meeting hours per year. For service duties whose work occurs primarily outside of meetings, workload shall be calculated based on approximate hours of work per year. In either case, WLU correspond to the non-instructional workload formula above, where 10 hours of non-instructional work = 1 WLU. Additionally, in recognition that chairing a committee creates additional workload, chairing a committee shall count as an additional 0.1 WLU per meeting (that is, an extra hour of work for every meeting).

To ensure institutional equity in workload assignments, major university-wide service shall be divided into three categories: high-commitment service (> 20 hours per year), mid-commitment service (10-20 hours per year), low-commitment service (< 10 hours per year).

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In addition to major university-side service, other non-instructional duties as assigned by a department and according to departmental needs shall be calculated according to the non-instructional workload formula. Department chairs shall justify their classification of departmental service workload in their annual workload reports. This list shall be revisited each June by departments and OT-AAUP.

Student advising workload shall be capped at 50 advisees per faculty member and shall follow the non-instructional workload formula, where 10 hours of work = 1 WLU. That formula shall be applied specifically to advising in the following way.

\[
\begin{align*}
< 15 \text{ students} &= \text{not quantified} \\
15 \text{ students} &= 0.5 \text{ WLU/quarter} \\
30 \text{ students} &= 1 \text{ WLU/quarter} \\
31-40 \text{ students} &= 1.5 \text{ WLU/quarter} \\
41-50 \text{ students} &= 2.0 \text{ WLU/quarter}
\end{align*}
\]

Service work in the form of program director shall receive a minimum of 3 WLU per term. Other departmental service such as scheduling, program assessment, retention and recruitment coordinator, shall receive commensurate recognition of work according to the workload formula in this section.

Quantifying Professional Development.

In recognition of the disciplinary expertise of individual departments, professional development shall be quantified at the departmental level in accordance with the non-instructional workload formula. For example, a department may determine that presenting at a regional conference is worth .5 WLUs while presenting at a national conference as worth 2 WLUs, etc. Such determinations shall be justified in both the annual Faculty Objectives Plan and in the department’s annual workload reports.

Section 6. Maintaining Full FTE

In the event of course cancellation for insufficient enrollment, the Department Chair shall work with the affected faculty member to determine if it is possible to replace the course assignment with an equivalent course assignment within the same appointment period and academic year.

If it is not possible to replace the course assignment within the same appointment period and academic year, the department may provide an equivalent, alternative non-instructional assignment consistent with the department’s workload policy. Examples of such work include but are not limited to the following: advising; determining course equivalencies for transfer credit; assessment projects; curriculum development; recruiting. The equivalent, alternative assignment must be assigned and realistically completed during the same term the cancelled course was scheduled.

Section 7. Overload and Overload Compensation

Any work—instructional or non-instructional—performed by faculty members beyond their 36 WLU full-time workload shall be considered overload. In recognition that overload work is work outside of a faculty member’s regular annual contract, performing instructional or non-instructional work outside of 36 WLUs (i.e., workload of 37 WLUs or above) shall never be mandatory and shall

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always be compensated. To maintain departmental flexibility with workload assignments, overload shall be formally calculated at the end of spring term and paid on June 30th. The June 30th overload will be added to the faculty salary calculation for retirement benefits.

Overload shall be compensated per WLU at 1.5 times the bargaining unit member’s annual base salary, as determined by the following workload overload formula:

\[
\text{Salary divided by total annual WLU} = \text{pay per workload unit (WLU)}
\]

e.g. 9-month salary divided by 36 = pay per workload unit (WLU)

\[
12\text{-month salary divided by 48} = \text{pay per workload unit (WLU)}
\]

Example A:

9-month salary ($54,000) divided by 36 = $1500.00/WLU

$1500/WLU x 1.5 = $2250/WLU (overload pay per WLU)

Example A Overload Compensation:

6 WLU x $2250/WLU = $13500

Example B:

9-month salary $72000/36 WLU = $2000/WLU

$2000 WLU x 1.5 = $3000/WLU (overload pay per WLU)

Example B Overload Compensation:

6 WLU x $3000/WLU = $18000

No faculty member shall be forced to take on overload work; overload must always be voluntary. Overload shall be distributed in such ways that faculty shall have equal opportunities to fulfill responsibilities needed for tenure and/or promotion, and instructional and non-instructional workload should not disadvantage faculty members’ promotion and/or tenure process (e.g., faculty who are deficient in non-instructional criteria should not be encouraged to overload in instructional workload, etc.).

Externship overload shall be calculated according to the following formula: $60 per student-basis per credit hour.

Hybrid or online courses shall be loaded equivalently to face-to-face/traditionally delivered courses. All other loading procedures in this Article shall apply.

Section 8. Course Caps

Course caps (maximum number of students) shall be determined in consultation with departmental faculty, and these caps shall be based primarily on established disciplinary and pedagogical best practices. Course caps shall be clearly communicated to bargaining unit members at least at the time of course scheduling or earlier, whenever possible.

A course can only be over-enrolled with the explicit voluntary consent of the faculty, in exceptional circumstances, and compensated at pro-rated workload units (for example, a course loaded as a 3...
WLU with an established cap of 20 students, shall be loaded as a 6 WLU course if a faculty agrees to teach the course with 40 students in it).

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