

(A) Purpose

This Workload Measurement Methodology serves to further the University's tripartite mission of teaching, professional activity, and service. It is developed to meet the requirements of [university policy 3364-72-03](#). Department chairs in the College of Health and Human Services shall assign faculty workload in a manner that, while providing flexibility, is consistent, transparent, and equitable, in accordance with the framework described herein.

(B) Scope

This Workload Measurement Methodology applies to all department chairs in the College of Health and Human Services. This methodology is intended to align with the Collective Bargaining Agreements between The Board of Trustees for the University of Toledo and The American Association of University Professors University of Toledo Chapter. If any item in this methodology conflicts with the Collective Bargaining Agreements, then the Collective Bargaining Agreements prevail. For faculty not bound by Collective Bargaining Agreements, this methodology is intended to inform upcoming revisions to departmental handbooks

(C) Procedure

- (1) Assigner of Faculty Workload: Annual workload for each faculty member shall be assigned/revised by their Department Chair following solicitation of input from and in consultation with the faculty member. All workload assignments require approval by the Dean.
 - (a) Chairs have discretion on the structure and methodology for soliciting input from and consulting with faculty members when developing workload assignments.
 - (b) Unless specifically noted, for the purposes of this Workload Measurement Methodology, the term "faculty" applies broadly to all individuals with faculty appointments including tenured, tenure-track, lecturers, and visiting appointments (not covered by CBA). It does not include part-time adjunct instructors.
 - (c) To incorporate program-specific needs and ensure alignment with accreditation requirements, the chair shall solicit and consider recommendations from program directors when assigning workload for faculty in the program.
 - (d) Any workload assignment impasses will be mediated by the Dean whose determination will be final.
- (2) Structure and Measurement of Faculty Workload
 - (a) Faculty workload assignment shall be congruent with letters of offer and/or (for tenure-track/tenured faculty) the current annual letters/statements of expectations.
 - (b) Faculty workload assignment shall align with tenure and promotion expectations / elaborations and provide the opportunity to meet them.

- (c) Individual workload assignment by the department chair shall depend upon the faculty member's mix of assigned teaching, service, and/or professional activity.
 - (d) Faculty workload in the college shall be delineated in credit hours or credit hour equivalents. Where applicable, items not natively delineated in credit hours shall be translated into "Credit Hour Equivalent per Semester" as noted in [university policy 3364-72-03](#).
- (3) Teaching portion of the workload:
- (a) The teaching portion of the faculty workload is governed by the definitions and limits in the collective bargaining agreements. The actual number of instructional hours shall depend upon the mix of a faculty member's teaching, professional activity, and service.
 - (b) In this Workload Measurement Methodology, the term "teaching" is used broadly. While it includes course instruction, it also includes activities in preparation for and support of instruction as well. These activities in support of teaching are embedded within the credit hours assigned through courses and are not assigned separate credit hour equivalents.
 - (i) Examples of typical embedded teaching-related activities include but are not limited to holding office hours, mentoring students, developing/updating course material, assessing course learning outcomes, course-related accreditation activities/documentation, etc.
 - (ii) Chair Discretion: Where the chair and faculty member identify that the faculty member contributes in these areas in a substantially greater than typical way, the chair has flexibility to designate a greater portion of the total workload to teaching or to establish Credit Hour Equivalents for selected activities as part of the teaching portion of workload.
 - (c) Credit hours for course instruction for individual didactic and laboratory courses shall be counted in the teaching portion of the workload at values equal to the courses' assigned credit hour values except as noted for the following:
 - (i) Multiple Instructors: For courses with multiple instructors, the credit hour values shall be prorated based on the percentage of the course delivered by each instructor. For courses where a faculty member is jointly assigned as instructor with one or more graduate students, the faculty member's supervisory or course coordination role is also considered when prorating the credit hour values.
 - (ii) Guest Lectures: The use of guest lectures is common, appropriate, and often contributes to greater richness in course content. In most cases, when faculty arrange for guest lectures in their assigned course(s), the faculty member remains present for the guest lecture and usually participates in the discussion as is situationally appropriate. Alternately, faculty often arrange for a guest lecture when they are briefly ill, temporarily

unavailable (e.g., for a meeting conflict) or traveling (e.g., when presenting at a conference). In any of these cases, the faculty member is given full workload credit for the course. However, for courses where a substantial portion of the course is delivered through guest lectures without the faculty member being present, the credit hour values for the faculty member may be prorated based on the percentage of the course they deliver.

- (iii) Course-specific Considerations: Some courses present unique considerations such as large class size, integration of new technologies/ pedagogies, unique instructional or assessment methods, large number of preps, etc. The chair has discretion to determine a credit hour equivalent for the course that takes into consideration the unique factors germane to the specific course. This determination should be consistent across similar courses.
- (iv) Embedded Laboratory Activities: Courses that contain both didactic and laboratory teaching within the same single course offering often require additional contact time or preparation time beyond that reflected in the course's assigned credit hours. In such cases, the chair has discretion to use either the allotted credit hours for the course or, on a course-by-course basis, to determine a credit hour equivalent for the course that takes into consideration the course's contact hours, required preparation, and other factors germane to the specific course. This determination should be consistent across similar courses.
- (v) Experiential Learning Courses such as Clinicals, Fieldwork, Internships, and Externships: Some programs use courses where students are placed at affiliated sites for experiential learning. While in many cases these are overseen through administrative release for a faculty member serving in a coordinator/director type of role, some programs distribute this work across multiple faculty who serve as course instructors for the specific experiential learning courses. Such courses exist in multiple forms across the college's programs and there is no "one-size fits all" approach to assigning teaching workload for them. The following is a general framework to assist Chairs in assigning teaching workload for these courses:
 - (a) Experiential learning courses with no classroom component and where faculty member of record does not directly supervise or evaluate the clinical/fieldwork performance of students: The faculty member's role is largely administrative. As such, these courses are not generally assigned teaching workload credit at the time of the course. However, a single 3-credit hour teaching release will be granted for each 45 student-credit hours accrued in these courses that is not already accounted for as part of an administrative release (such as clinical coordinators have). This earned release cannot be used in a term where it would create an

overload. In such cases, the release will be held and applied in a different term where it does not create an overload.

- (b) Experiential learning courses that include a classroom component and/or where faculty evaluate the clinical/fieldwork performance of the student in the experience: These courses require increased faculty time and effort in teaching. They necessitate that the chair determines, on a course-by-course basis, a credit hour equivalent appropriate to the contact time and effort required of the faculty for the specific course.
 - (c) Recommendation: When the faculty role in experiential learning is primarily administrative, the college encourages the organization and oversight of experiential learning to be consolidated and assigned as an administrative release for a clinical/fieldwork coordinator/director wherever possible. This is preferred over embedding these efforts within course-based workload of multiple individual faculty members.
- (vi) Independent study / individualized learning experiences governed by university policy 3364-71-25: Independent study courses are individualized, faculty-supervised learning experiences that give students opportunity to explore knowledge not otherwise represented in regular curricular offerings. In contrast, non-individualized, planned recurring course offerings are more suited to regular courses or seminar courses instead of independent studies. Independent studies are typically instructor-initiated (rather than department initiated) and are sporadic by nature. As such, they typically are not included in the workload at the time of the course. However, a single 3-credit hour teaching release will be granted for each 45 student-credit hours accrued in these courses that is not already accounted for as part of an administrative release or where the faculty member receives extra compensation for their administration of the experience. This earned release cannot be used in a term where it would create an overload. In such cases, the release will be held and applied in a different term where it does not create an overload.
- (vii) Student research / Honors Learning Contracts: Student research and honors learning contracts are typically individualized, faculty-supervised learning experiences. They are typically instructor-initiated (rather than department initiated) and are sporadic by nature. As such, they typically are not included in the workload at the time of the course. However, a single 3-credit hour teaching release will be granted for each 45 student-credit hours accrued in these courses that is not already accounted for as part of an administrative release. This earned release cannot be used in a term where it would create an overload. In such cases, the release will be held and applied in a different term where it does not create an overload.

- (viii) Scholarly Projects: Select graduate programs in the college include a “Scholarly Project” that is completed by all students and is generally used in lieu of a thesis or dissertation. These projects, by their nature, seldom result in publishable scholarship for the faculty who supervise them and typically do not produce products that are useful toward the faculty member’s professional activities. The sheer number/volume of these scholarly projects each term requires substantial teaching time for the supervising faculty and justifies that they be included within teaching workload. They are often multi-semester projects and the number of student-projects supervised by each faculty member frequently varies. To account for this variability, the equivalent of 1 credit hour of workload will be assigned for every 15 scheduled student-contact hours.
 - (ix) Dissertations: Dissertations are individualized, faculty-supervised learning experiences. They frequently result in products that also contribute to the faculty member’s professional activities / scholarly productivity and that contribution is accounted for in determining teaching load credit for these courses. They are typically instructor-initiated (rather than department initiated) and are sporadic by nature. As such, they typically are not included in the workload at the time of the course. However, a single 3-credit hour teaching release will be granted for each 45 student-credit hours accrued in dissertations. This earned release cannot be used in a term where it would create an overload. In such cases, the release will be held and applied in a different term where it does not create an overload.
 - (x) Master’s Theses: Theses are individualized, faculty-supervised learning experiences. They seldom result in products that also contribute to the faculty member’s professional activities / scholarly productivity and that lack of professional activities contribution is accounted for in determining teaching load credit for these courses. They are typically instructor-initiated (rather than department initiated) and are sporadic by nature. As such, they typically are not included in the workload at the time of the course. However, a single 3-credit hour teaching release will be granted for each 36 student-credit hours accrued in dissertations. This earned release cannot be used in a term where it would create an overload. In such cases, the release will be held and applied in a different term where it does not create an overload.
 - (xi) Interprofessional Education (IPE) Program: The college is an active partner and participant in the University’s School for the Advancement of Interprofessional Education. Faculty participation as an IPE facilitator will be included in the teaching portion of the workload assignment in accord with guidelines developed across the participating colleges. Service on the IPE steering committee is accounted for under the service portion of the workload assignment.
- (4) Service portion of the workload:

- (a) In our college, both tenure/tenure-track faculty and lecturers routinely engage in professional service to some degree, whether at the program, college, university, discipline, or community-engagement level. This professional service must be recognized as part of their assigned workload.
 - (b) The service portion of the workload encompasses professional activities including:
 - (i) Institutional Service on program, departmental, college, and/or university activities, events, initiatives, and committees. This service is expected of all faculty in the college.
 - (a) Examples include but are not limited to Faculty Senate, UCAP, convocations, orientations, faculty development events, required trainings, commencements, recruiting activities/events, ceremonies/recognition events, faculty meetings, grand rounds, accreditation activities, etc.
 - (ii) Professional service and leadership within the faculty member's discipline.
 - (iii) Professionally-related community outreach, engagement, and/or service that is specifically tied to the faculty member's scholarly/professional expertise.
 - (c) Chair Discretion: To provide the ability to consider outsized or unanticipated service activities that the chair and faculty member identify as benefiting the department or college, the chair has flexibility to designate a greater portion of the total workload to service or to establish Credit Hour Equivalents for these activities as part of the service portion of workload.
 - (i) Those with assigned administrative roles may qualify for this and reassignment of workload will be in congruence with the assigned role and duties performed.
 - (d) For significant time-consuming external service roles such as serving as the President of a professional organization, the organization would typically be expected to fund an amount of faculty salary recovery to account for the excessive workload effort devoted to the activity.
- (5) Professional activities portion of the workload
- (a) The professional activities portion of the workload is required for tenured and tenure-track faculty. Although not required for lecturers, professional activities are permissible when agreed to and included as part of their overall workload assignment.
 - (b) The professional activities portion of the workload includes time devoted specifically to activities typically described in departmental elaborations for

collectively bargained faculty or handbooks for faculty who are not collectively bargained.

- (c) The college rewards consistent accomplishment of certain impactful professional activities as they make important reputational contributions to the department, college, and university. Therefore, an equivalent of 3 credit hours of teaching release each semester (over and above their normal professional activities portion of workload) is available to reward certain impactful scholarly accomplishments. The threshold level to receive this extra release is an average of 2 of the following impactful scholarly products per year over the previous 3-year period (i.e., 6 listed impactful scholarly products over the previous 3 years). For cases where 4-5 of the following impactful scholarly products have been accrued over the previous 3 years, a 3-credit hour release is available for a single semester.
- (i) The following rewarded activities list is intentionally different from the list(s) of activities countable within the Professional Activities portion of the tenure and promotion elaborations/standards. While all items on the specific list of rewarded activities below are countable within the Professional Activities portion of the tenure and promotion elaborations/standards, not all items that count toward meeting the elaborations/standards are included as activities meriting the teaching release reward described in this section. Exclusion of items from the rewarded activities list does not lessen their ability to count toward tenure and promotion in any way. The following are the specific impactful scholarly products the college seeks to reward with extra teaching release:
- (a) Principle Investigator on extramural grants/contracts funded for \$20,000 or more. (1 grant/contract of \$20K or more = 1 product, regardless to total size of award)
- (b) Plenary, workshop, and panel-discussion presentations as the presenting speaker at National / International Symposia/Conference
- i. These are often invited or involve submitting a plenary session/workshop/panel-discussion proposal. They do not have to be a “Keynote” session. They differ from presenting a single study as a poster/podium presentation.
- (c) Published peer-reviewed scholarly journal manuscripts or peer-reviewed clinical practice guidelines.
- i. If there are indexed journals in the faculty member’s discipline, journal manuscripts should appear in indexed journals or journals with high impact factors for the discipline.
- (d) Published Authored or Edited Textbooks

- i. Published by recognized academic, university, or commercial textbook publishers (e.g. University Press, McGraw-Hill, Lippincott, F.A. Davis, Saunders, etc.). Self-published works generally do not apply in disciplines in our college.
 - (e) Published Academic Textbook Chapters
 - (f) Published Conference Proceedings (proceedings are a collection of academic papers published in the context of an academic conference or workshop. Excludes published abstracts of individual study poster/podium presentations.)
 - (g) Published Monographs (as described at <https://www.sciencedirect.com/topics/social-sciences/monograph>)
- (ii) Primary authorship of a qualifying publication is recognized as carrying even more impact and requiring more effort. As such, primary authorship of rewarded publications will be weighted as 1.5 publications. Primary authorship includes being listed as first author or senior author.
 - (a) Senior author status is not applicable on publication of dissertations of students supervised by the faculty member as dissertations are necessarily the primary scholarly work of the student.
- (d) Additional reduction in teaching for professional activities beyond the 3 credits to reward scholarly impact described above can be negotiated as follows:
 - (i) As described in the letter of offer / annual statement of expectations.
 - (a) Including a time-limited period of teaching reduction within letters of offer for new faculty is typical.
 - (b) Additional reduction for a time-limited period to accomplish a specific project may be appropriate for faculty members and may be included by the chair in the annual statement of expectations.
 - (ii) When supported by faculty salary recovery funds (e.g. grants and contracts). This may be limited by restrictions imposed by some sponsors.
- (D) References
 - (1) [University policy 3364-72-03 - Faculty Workload Measurement and Reporting Requirements for Colleges of the University of Toledo](#)
 - (2) [University policy 3364-71-25 – Independent Study Courses](#)

- (3) Collective Bargaining Agreements between The Board of Trustees for the University of Toledo and The American Association of University Professors University of Toledo Chapter (Tenured, Tenure Track)
- (4) Collective Bargaining Agreements between The Board of Trustees for the University of Toledo and The American Association of University Professors University of Toledo Chapter (Lecturers)