

Deans:

I have attached a memo to you and a draft statement regarding implementation of workload policy. This memo is in response to our discussion at Cabinet (early June).

The question of "how" to get the best results will require more discussions, so I'm anxious to get your feedback at our retreat next week and to continue working on implementation over the summer.

However, the question of whether or not to make such improvements is not on the table... we need unit level workload policies that are consistent with our values and have integrity both internally and externally.

I will be completely supportive of your efforts as we move forward to get this done.

July 9, 2002

To: UMKC Deans
From: Steve Ballard, Provost

Subject: Faculty Workload Standards

The Executive Cabinet identified seven goals as our long-term expression of the UMKC vision and values. These were presented in the July 3, 2002 Cabinet meeting. Each unit has been asked to develop a unit-wide commitment to those goals, and identify local actions which support that commitment. One action that has been identified is the alignment of each unit's internal policies, e.g., workload policy, to support the goals. Please review (and modify) your academic unit's workload policy and its implementation to ensure alignment with UMKC's vision and values and consistency with Curator Policy (attached). For example workload policies should embrace community, produce academic excellence, promote partnerships, and unleash human potential. Workload policies should assure that we are living our core values, especially those key values of integrity, accountability, and collaboration.

I encourage you to pay particular attention to the relationship between implementation of workload policy and improvements in the situation with part-time faculty. Serious questions have emerged over the past year with respect to the integrity of our approach to part time faculty and our accountability with respect to SCH productivity. In a university committed to academic excellence and education first, our best full-time faculty must be the ones engaged the most frequently with our students and with the largest numbers of our students. If a faculty member consistently teaches very small numbers of students, especially in disciplines where part-time faculty are heavily employed, then issues of integrity and accountability demand a re-examination of the overall teaching responsibility of the faculty member. As a university we have an obligation to take care of our core curriculum with our best full-time faculty.

This request should not be interpreted as a requirement for uniform teaching loads for all faculty members, rather as a requirement to develop policy that stands up to the value test. It is imperative to be able to demonstrate that your unit is committed to our core values and also complies with the policy of the Board of Curators.

I look forward to receiving your comments. We will place the topic of workload policies on the agenda for the Dean's Retreat in July, with the goal of reviewing and implementing these new standards during the coming academic year.

DRAFT

Workload Implementation

Each academic unit shall have on file with the Provost's Office a copy of their current workload policy by the first day of the Fall semester of each academic year.

Regular faculty members are expected to work full-time in the three functions of research, teaching, and service (university citizenship). As you review your workload policies, please keep the following in mind.

- (1) Workload expectations must be aligned with the core values of UMKC,
- (2) Implementation must include expanded teaching options for those who cannot/do not seek doctoral/graduate faculty status,
- (3) It is critical to recognize and strengthen our support for intellectual diversity, and
- (4) Workload standards should include sufficient flexibility to accommodate the need to renegotiate in situations where changes have occurred. Flexibility should recognize, among other potential factors, faculty contributions to research funding, administrative duties, scholarship responsibilities, major service/outreach assignments, and individual advising and instruction.

The responsibility for assigning teaching loads rests with the dean, upon the recommendation of the division/department chairs. In general, tenured or tenure-track faculty are expected to teach the equivalent of 9 credit hours for each Fall and Winter semester. A faculty member, in consultation with the division/department chair, may request (or the dean may assign) teaching as the faculty member's major workload activity. In such cases, a faculty member is expected to carry a teaching load of 12 credit hours per term.

Teaching at UMKC

Teaching is defined as class-related instructional activities; supervision of students in studios, labs, fieldwork, and clinical settings; and other direct contact time with students for the purpose of providing instruction. The following related aspects of teaching, while important, cannot be used exclusively or as the regular major component to satisfy the 9 hour requirement:

- Serving on a thesis committee
- Participating on a dissertation committee
- Supervising independent study or independent readings
- Leading colloquia

None of these activities should be routinely used to replace a normal teaching load.

Deviations from the Curators' Policy on teaching workload for individual faculty members must receive prior approval from the Provost. By September 30 of each Fall semester and February 28 of each Winter semester, the Provost's Office will receive from each Dean a matrix that includes faculty name, title, rank, course name, course number, credit hours, and enrollment for the current semester.

In those cases where courses are cancelled for lack of adequate enrollment, faculty members shall be assigned to other duties in the current or subsequent semesters to meet teaching workload expectations.

In general, courses taught for extra compensation by regular faculty will not reduce the obligation to meet the teaching workload requirements of the school. It is assumed that teaching for extra

compensation will not jeopardize doctoral/graduate faculty status nor serve as a substitute for scholarly activity.

Evaluation and Assessment

Each academic unit shall develop evaluation mechanisms and criteria that not only align with its mission, but also support UMKC's vision and values. As part of the year-end annual review process, the division/department chair shall evaluate each faculty member on the basis of the following to determine satisfactory or unsatisfactory performance with respect to their workload assignments:

- (1) active participation in enrollment management, student retention and advising,
- (2) effectiveness of student learning through measurable learning outcomes,
- (3) individual career development and progress,
- (4) high-quality scholarship, creative activity, and/or performance (e.g., publications, research, grants, presentations, recordings, creation of original works), and
- (5) community engagement and outreach.

During the year-end annual review process, each faculty member shall negotiate workload with his/her respective division or department chair. The final decision for workload assignments rests with the dean, and shall be finalized each May for assignments in the following academic year.

UM Curator's Workload Policy

FACULTY WORKLOAD POLICY

Bd. Min. 12-3-92.

310.080 FACULTY WORKLOAD POLICY

A. Each department/division will have in place and on file in the Vice-Chancellor/Provost's office an approved workload model which specifies the types of faculty assignments and percent of effort distribution consistent with the purpose of the unit.

B. Workload data will be aggregated by the department/division on an annual basis. These data will be incorporated into the Institutional Data System (which is being developed) and reported to the Board of Curators.

C. In general, regular faculty are expected to work full-time in the three functions of research, teaching, and service. The teaching load for individual faculty should reflect the following factors:

1. Research funding.
2. Time devoted to individual instruction and advising.
3. Assignment of administrative duties.
4. Service assignments.

D. The University's goal is an average instructional responsibility of 9 hours, including individual instruction, for all tenured and tenure-track faculty.