



OLPD Workload Policy

Note: Language for this policy was adapted from the [CEHD workload policy](#), which supersedes information in this document.

Reason for Policy: This policy intends to promote productivity in the areas of research and discovery, teaching and learning, outreach and public service, and unit service and leadership, as well as promote collaborative work and other activities that enhance the mission of the Department of Organizational Leadership, Policy, and Development (OLPD), the College of Education and Human Development (CEHD), and the University of Minnesota. This policy also establishes normative standards for equitable distribution of effort across faculty and academic staff, recognizing that the department must also be flexible in expectations that apply to a diverse group of program areas and instructors. The emphasis in this policy is on teaching and advising workload consistent with existing CEHD and university policies relevant to overall workload and performance. Unforeseen and unexpected circumstances may require temporary adjustments to this policy to meet the essential needs of the department, individual programs, and members of the department community. Such adjustments, which are to be reviewed by the program coordinators and approved by the department chair, should be documented along with the reasons for the adjustments.

Scope: This policy applies to OLPD faculty and academic staff who hold appointments between 75-100%, including tenured and tenure-track faculty (TTTF), contract faculty (CF; both teaching and research faculty), and academic professional and administrative staff (P&A) who are engaged full-time in instruction and scholarship.

Policy Statement:

1. All TTTF, CF, and P&A must meet minimum standards for research and discovery, teaching and learning, outreach and public service, and unit service and leadership as defined in the 7.12 statement for Faculty Review, Promotion, and Tenure (for TTTF) and individual position descriptions for CF and P&A personnel.
2. The percentage effort devoted to research, teaching, and service, must be congruent with the job description for the individual who is hired and the source of funding for the position. These agreed-upon percentages must also consider departmental and disciplinary needs, developmental opportunities, leadership responsibilities, and department and college budgets.
3. According to CEHD policy, advising and mentoring students counts towards TTTF teaching load. In a typical 40-40-20 TTTF load, approximately 40% of a faculty member's effort should be devoted to formal teaching activities (preparation, instruction, office hours) and advising/mentoring and another 40% to research; outreach and public service, as well as service to the department, college, and university (including attendance at program and department meetings), should typically constitute 20% of a faculty member's effort.



4. It is expected that TTTF teach undergraduate, graduate, and/or professional education courses in alignment with their academic expertise and program needs. The graduate program coordinators, in consultation with the TTTF and CF in their program, the director of undergraduate studies (DUGS), and the director of graduate studies (DGS), make the initial teaching assignments for the upcoming academic year, but it is the chair who has the final authority on course assignments.
5. A typical course load for TTTF (without buyouts) is two 3-credit courses per semester, with a minimum of one course per semester. Exceptions may be granted by the chair due to administrative duties, sponsored research, or contractual agreements for new faculty. Faculty who are buying out of courses (e.g., through grant funding) are expected to teach at least one course per academic year. Course loads for CF and P&A faculty are specified in their position descriptions. If a course enrollment is too low to run, then adjustments to the instructor's workload must be developed. In most cases, class sizes should not drop below 20 students for an undergraduate and post-baccalaureate class, 10 students for a 5000-level graduate class, and 6 students for a 8000-level PhD class. Co-teaching may be an option for certain kinds of courses, especially new classes linked to specific department and university initiatives. Instructors should discuss this option with their program coordinator and the department chair to ensure sufficient staffing of required courses and a higher level of student enrollment to warrant two instructors. Faculty who seek to teach/co-teach as part of university initiatives like Grand Challenges and Honors Experiences must first discuss with the chair because these courses have revenue and staffing implications for the department; if approved, these courses count toward the two-course per semester teaching expectation for faculty who do not have course buyouts.
6. All TTTF are expected to achieve and maintain graduate faculty status and be in good standing to advise graduate students. Successful, timely completion of masters' and doctoral advisees is an expectation of tenured faculty. TTTF are expected to advise an increasing number of graduate students as they advance in their careers from assistant to associate to full professor. Within each graduate program and across the department, coordinators and the chair should work to ensure that advising loads are equitable, taking into consideration faculty rank and overall workload, including the number of master's and doctoral committees upon which someone serves. Equity in advising also includes recognizing that students enter graduate school with different degrees of academic preparation and require different levels of support from faculty mentors. In general, the expectation in OLPD is that faculty advise 10-15 master's and PhD advisees at any time. For P&A and contract teaching faculty, advising and mentoring students should align with the FTE specified in their position descriptions.
7. TTTF and P&A whose teaching/advising loads are outside of what is typically expected (e.g., out of alignment with their position description and/or significantly outside of what is typically expected of others in the same job code) may discuss instructional load adjustments or additional support with their program coordinator and department chair to ensure fair and balanced teaching loads. The chair is the final authority on instructional workload adjustments and additional support.
8. Each year, an individual's workload should be clearly documented in the spring semester prior to the next academic year. There is a possibility of [inloading](#) effort in summer months prior to the academic year, typically for TTTF, *when program requirements dictate this need*. Early in the spring



semester, the chair will meet with each program coordinator to confirm the overall workload plan for the program, and then meet with each TTTF and P&A to document the plan.

9. Adjustments to workloads for P&A instructors or CF may occur if department needs require it, resulting in some adjustments in service or leadership efforts. These changes must be documented annually. These changes should not move an individual's efforts out of their work scope (per the [CEHD Work Scope Guidelines](#)).
10. Any adjustment of an individual's workload owing to a buyout agreement must be documented using the appropriate form, and approved by the chair. If faculty are bought out of some of their required teaching loads, sufficient buyout funds from a grant or funding source must be identified by the faculty member. A course buyout in OLPD for a 3-credit course is determined annually in collaboration with CEHD leadership and based on a percentage of the faculty member's salary, and should be sufficient to cover the cost of replacement instruction.
11. Faculty members on approved phased retirement plans must continue their research, teaching, advising, and service-leadership across the years of their phased retirement—as outlined in [CEHD's Phased Retirement Policy & Work Plan Agreement](#).
12. Releases from teaching may be offered when faculty are elected or asked to serve in key leadership roles within the department that require extensive time and effort (for example, as the DGS or DUGS). Course release funds must come from a department account. Typical course releases include:
 - a. Chair (typically teaches, in the fall term, OLPD 8011 for new PhD students in the department)
 - b. Associate chair (1 course release per year)
 - c. [Director of Graduate Studies](#) (1 course release per year)
 - d. [Director of Undergraduate Studies](#) (1 course release per year)
13. TTTF with <100% FTE in OLPD will have an individual workload agreement with the chair that specifies how their reduced appointment will be distributed across research, teaching, and service. This altered distribution may be considered in the merit committee's review of annual performance.
14. Any agreements regarding a transfer of effort for a faculty member must be documented in an MOU. Refer to the appropriate procedures for a [transfer of effort within CEHD](#) or a [transfer of effort outside of CEHD](#). In addition, changes in workload must be financially viable and cover the cost of the instruction, research, service activity or service-leadership endeavor; have a return for the department; and an incentive for the faculty or academic staff member that brings in additional resources including indirect costs.

Procedures:

- ["In-loading" Teaching Efforts to address Academic Needs](#)
- [CEHD Phased Retirement Policy & Work Plan Agreement](#)
- [Transfer of Work Duties within CEHD](#)
- [Transfer of Work Duties outside CEHD](#)

Forms / Instructions:



- This form for OLPD is under development. It will be completed by each P&A instructor, CF, and TTTF in collaboration with their supervisor during the annual performance review meeting each spring beginning in 2024. The form can be revised as needed (e.g., when a grant is awarded with a course buy-out; when course schedules need to be rearranged).

Appendices:

- [CEHD Work scope Guidelines](#)

FAQ:

- [CEHD Workload Policy Frequently Asked Questions](#)

Definitions:

The threefold mission of the university is defined in the [Board of Regents Mission Statement](#):

- **Research and Discovery** - To generate and preserve knowledge, understanding, and creativity by conducting high-quality research, scholarship, and artistic activity that benefit students, scholars, and communities across the state, the nation, and the world.
- **Teaching and Learning** - To share that knowledge, understanding, and creativity by providing a broad range of educational programs in a strong and diverse community of learners and teachers, and prepare graduate, professional, and undergraduate students, as well as non-degree seeking students interested in continuing education and lifelong learning, for active roles in a multiracial and multicultural world.
- **Outreach and Public Service** - To extend, apply, and exchange knowledge between the University and society by applying scholarly expertise to community problems, by helping organizations and individuals respond to their changing environments, and by making the knowledge and resources created and preserved at the University accessible to the citizens of the state, the nation, and the world.
- **Unit Service and Leadership:** As a large academic organization, CEHD requires the service and leadership of all of its members to effectively operate and administer its many programs and services. We take on these roles in order to effectively deliver on the threefold mission of the institution. All faculty and staff are expected to engage in service and leadership in their respective program areas and academic units, as well as the college, campus, and institution when provided with the opportunity and able to do so.
- **Tenured and Tenure Track (TTTF) Appointments:** Regular TTTF are engaged in research and discovery, teaching and learning (including advising and mentoring students at all levels), outreach and public service, and unit service and leadership. This workload policy applies to TTTF on appointments of at least 75% as professor (9401), associate professor (9402), or assistant professor (9403). Typically, faculty are allocated approximately 40% of their appointment for research and discovery efforts, 40% for teaching and learning efforts, and 20% for outreach and public service and



unit service and leadership effort. Refer to [Work Scope Guidelines](#). Appointment allocations may vary for those in leadership roles, as specified in unit workload policies.

- **Contract Teaching (CT) and Contract Research (CR) Faculty Appointments:** CTs are those individuals with primary responsibilities related to the teaching mission (approximately 80% - 90% of their effort focuses on teaching/instructional components); these individuals may also have some leadership-service and outreach effort (approximately 10% - 20%); research is optional. CRs are those individuals with primary responsibilities related to the research mission (typically 90% - 100%); these individuals may occasionally serve on a doctoral committee or teach a seminar but this is optional. Instead, it is expected that they secure funding that covers their appointment and work on these funded research projects. This workload policy applies to CTs and CRs on appointments of at least 75%. Refer to [Work Scope Guidelines](#).
- **Academic Professional and Administrative (P&A) Appointments:** For P&A staff, this workload policy applies to those with primary responsibilities in activities related to the teaching and advising mission. These individuals may also have service, or program coordination requirements associated with their jobs, or outreach expectations and/or administrative responsibilities. Research efforts are limited and not required. These individuals are on appointments of at least 75%. P&A are generally, but not exclusively, appointed in job categories such as Teaching Specialist (9754) or Lecturer (9753). Typically, P&A instructors are allocated 80% effort to teach/advise, and 20% effort focused on service, outreach, and engagement. Refer to [Work Scope Guidelines](#).
- **Chair:** The chair is responsible for managing the administrative and budgetary functions of the unit, and is appointed by the dean, in consultation with OLPD community members and the senior management team. The chair oversees and is responsible for all workload plans for individuals in OLPD, including adherence to this policy.

Responsibilities:

- **Chair:**
 - The chair is responsible for the broad overview of the needs and expectations of the entire unit and the necessary role of each individual. The chair has the flexibility to adjust workloads among individuals in the unit, but only to the extent that the adjustments are equitable overall within a specified period of time.
 - Workload and adjustments to it, for TTTF, CF, and P&A, shall be documented and agreed to by the chair and TTTF/CF/P&A member. The information is to be shared within the unit.
- **Program coordinators:**
 - As their role relates to workload, program coordinators provide oversight of teaching and supervision assignments within the program and its component subplans, including initial approval and/or consultation regarding course buyouts, leaves, replacement instructors, course scheduling, and course development/revision. They are responsible for consulting with the department chair regarding proposed workload plans and may assist in documenting plans and agreements with P&A members whom they supervise.



- **Other leadership roles:**

- The following leadership roles are defined in the department bylaws: associate chair, director of graduate studies, director of undergraduate studies.

Related Information:

[Academic Appointment Category Details](#)

History:

(submitted to the OLPD faculty on 5/1/2023; amended and resubmitted to the faculty on 5/15/2023)

Approved by OLPD: May, 2023

Approved by CEHD dean: August 20, 2023