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Article 9: Workload

Section 1. Unless on approved leave, bargaining unit members shall be available for assignment of, and engaged in, professional duties for the entire period of their appointment. Professional duties are recognized to include instructional activities, research, scholarship, professional development, and service to the University, their profession, the community, and to the University mission.

Section 2. Oregon Tech has the sole and exclusive right under Article IV: Management Rights to assign faculty instructional and non-instructional work. The bargaining unit member's total work assignment shall be based on the member's contributions in each of the three areas: teaching, professional engagement, and service. These assignments should be consistent with the expectations for different appointments and ranks as per the Promotion, Tenure, and other related policies, and per the position description when advertised (within the first 3 years of appointment).

If a new type of appointment beyond those currently recognized is proposed during the term of this Agreement, the University and the Association agree to open negotiations to define workload and all other working terms and conditions for the new proposed appointments.

Section 3. Full-Time Workload Requirement (1.0 FTE).

(A) Instructional Faculty. The full-time base instructional and non-instructional workload requirement of a bargaining unit member on a 9-month appointment is a total of forty-five (45) workload units per academic year. For those bargaining unit members on an 11- or 12-month appointment, the base instructional and non-instructional workload requirement is a total of sixty (60) workload units per work year.

By the start of every term, the bargaining unit member and their respective Department Chair shall communicate and document their workload for that term.

(B) Library Faculty. Bargaining unit members employed in the Oregon Tech Libraries have appointments with primary duties in the university libraries. Full-time (1.0 FTE) librarian bargaining unit members shall work a forty (40) hour week on a schedule established by the University Librarian and develop library systems and resources to support the educational and applied research mission of Oregon Tech, such as reference service, library research, information literacy instruction, collection development, and bibliographic organization and control. Bargaining unit member librarians shall meet faculty and student needs consistent with the standards set forth by library professional associations, and in support of Oregon Tech programs and institutional accreditation commissions.

Section 4. Tenured/Tenure-Track Faculty Workload. Oregon Tech will attempt, whenever possible, to maintain a fair and equitable distribution of faculty workload. Exceptions to the following must be approved by the Provost.

(A). Instructional Workload. The full-time instructional workload for tenured and tenure-track bargaining unit members on a 9-month appointment shall be thirty-six (36) IWLUs per academic year and forty-eight (48) IWLUs for those on 11- or 12-month appointments. A bargaining unit member's teaching assignment may include any modality (face-to-face, remote, online, or hybrid). The normal instructional load is 12 IWLUs per term. To provide flexibility, bargaining unit members may work with their Department Chair to adjust their instructional load per term provided the total is 36 IWLUs per academic year for bargaining unit members on a 9-month appointment, or 48 IWLUs for those on 11- or 12-month appointments. Any exception will require approval by the Dean and Provost.

(B). Non-Instructional Workload. The full-time non-instructional workload for tenured and tenure-track bargaining unit members on a 9-month appointment shall be nine (9) non-instructional workload units (NIWLUs) per academic year and twelve (12) NIWLUs for those on 11- or 12-month appointments. Non-instructional workload units shall be used for scholarship, research, professional development, and service to the department, college, Oregon Tech, their profession, and/or the community, consistent with Oregon Tech's mission. The expected percentage of effort assigned to categories of activity will be addressed in the annual Faculty Objectives Plan and approved by the supervisor and College Dean. The assigned distribution of labor in each category of activity may vary over time during the year and the percentages should therefore be understood as a guide to the totality of the appointment, with sufficient time provided to support the service and professional development components of promotion.

Section 5. Non-Tenure Track Workload. Oregon Tech will attempt, whenever possible, to maintain a fair and equitable distribution of faculty workload. Exceptions to the following must be approved by the Provost.

(A). Instructional Workload. The full-time instructional workload for non-tenure track bargaining unit members on a 9-month appointment shall be forty (40) IWLUs per academic year and fifty-six (56) IWLUs for those on 11- or 12-month appointments. A bargaining unit member's teaching assignment may include any modality (face-to-face, remote, online, or hybrid). In order to provide flexibility, bargaining unit members may work with their Department Chair to adjust their instructional load per term up to a maximum of eighteen (18) IWLUs or a minimum of nine (9) IWLUs per term provided the total is 40 IWLUs per academic year for bargaining unit members on a 9-month appointment, or 56 IWLUs for those on 11- or 12-month appointments. Any exception will require approval by the Dean and Provost.

(B). Non-Instructional Workload. The full-time non-instructional workload for non-tenure-track bargaining unit members on a 9-month appointment shall be five (5) NIWLUs per academic year and four (4) NIWLUs for those on 11- or 12-month appointments. Non-instructional workload shall be for scholarship, research, and internal service to the department consistent with Oregon Tech's mission. The expected percentage of effort assigned to categories of activity will be addressed in the annual Faculty Objectives Plan and approved by the supervisor and College Dean. The assigned distribution of labor in each

category of activity may vary over time during the year and the percentages should therefore be understood as a guide to the totality of the appointment.

Section 6. Workload Reallocation. Under specific conditions, it may become necessary or beneficial for bargaining unit members to take on duties outside of instruction with a significant time requirement. Under these conditions, bargaining unit members shall be granted reallocation time from instructional workload, as described below. Chairs shall include this reallocation time in reporting the bargaining unit member's instructional workload each term, as "Reallocation: *type* - # IWLUs." Reallocation time shall be included in annual workload calculations, and therefore may count towards overload. If a bargaining unit member has guaranteed/approved reallocation time for a given term, and departmental need requires that they also teach a normal load, they will still receive credit for that reallocation time in total workload calculations. IWLUs described below will be prorated for bargaining unit members at less than 1.0 FTE.

(A). New Faculty. First-year bargaining unit members at Oregon Tech shall be granted 12 IWLUs towards course development for a 9-month appointment (or 16 IWLUs for 11- or 12-month appointments). To allow flexibility for departmental needs, Chairs should work with new faculty to develop a plan for distributing these IWLUs throughout the academic year.

(B). New Preparations and Course Development. After their first year, bargaining unit members who are assigned a course that has been offered at Oregon Tech within the last five years, but which they have never taught before, shall be granted 1 IWLUs for that term to allow time for course development. A bargaining unit member who is assigned a course that has not been offered within the last five years at Oregon Tech (including special topics courses) shall be granted 3 IWLUs for that term to allow time for course development.

(C). Research. With Oregon Tech's designation as a research university, and with a promotional requirement to conduct research, tenure/tenure-track faculty with a research requirement in their position description should be allotted time to conduct research. Required research shall receive 3 IWLUs per term. Research can include, **but is not limited to**, conducting research projects, leading a research group of undergraduate and/or graduate students, developing creative works, submitting proposals for external grants, or submitting manuscripts for publication. Bargaining unit members conducting voluntary research projects with students are not included here, but may apply using the Workload Reallocation Request (Appendix _).

(D). Grants. When a bargaining unit member is awarded a grant that includes required reallocation time, this reallocation time shall be honored, without needing to file the Workload Reallocation Request.

(E). Special Projects. In addition to the guaranteed reallocation time described above, bargaining unit members may apply for reallocation time for special projects. These applications should be made using the Workload Reallocation Request at least thirty (30) calendar days prior to the term for which the reallocation will be requested, and up to a year in advance. Special projects might include serving on ad-hoc committees for Oregon Tech, conducting service for a professional organization in the bargaining unit member's discipline, writing a book/textbook, serving as an editor for a discipline-specific journal, and other professional activities that are not defined by Article 10: Outside Activities. The Dean, in

consultation with the chair, shall approve or deny (with reasoning) the request within fourteen (14) calendar days. This type of reallocation time is generally limited to one class per term in the bargaining unit member's discipline (typically 3 or 4 IWLUs), though special consideration may be given for additional time where the project requires, including multi-term and multi-year projects.

Section 7. Workload Assignment. Except for bargaining unit member librarians, the Department Chair shall assign workload according to the needs of the department and in accordance with the terms described above. By the start of every term, the bargaining unit member and their respective Department Chair shall communicate and document their workload for that term. If unforeseen events occur or departmental needs change prior to the start of the term, a bargaining unit member's assignment may be modified by the chair in accordance with the terms of this Article.

Workload assignments are governed by the following definitions. A contact hour is defined as 50 minutes of scheduled instruction. One (1) instructional workload unit (IWLUs) is equal to one lecture contact hour (1.0 IWLUs = 1.0 lecture contact hour). Two (2) IWLUs are equal to three lab contact hours (2.0 IWLUs = 3.0 lab contact hours).

Hybrid, remote or online courses shall be loaded equivalently to face-to-face/traditionally delivered courses.

The following cases are given special consideration:

(A). Minimum enrollment for courses is seven (7) at the start of the term, and classes with 7 or more students will run with full workload credited. The following exceptions will apply automatically, with full workload:

- Courses that are required for timely completion of a curriculum receive full workload regardless of enrollment.
- When multiple sections of a class or lab are offered, minimum class size is based on an average of enrollment in those sections. If one section has a lower enrollment than 7, but the average across sections is above 7, the sections will run with all instructors receiving full workload. If all students from a low-enrolled section can be moved into other sections under their current enrollment cap, the low-enrolled section can be cancelled.

Any other exception for low enrollment requires the approval of the College Dean, which can include fractional workload that must be agreed to by the instructor prior to the start of the term, or offering the course as an independent study if there are three (3) or fewer students enrolled. When putting a bargaining unit member over the CBA articulated workload for a year, exceptions must first be approved by the Provost.

(B). Activities that do not receive instructional workload:

- Continuing Education courses can receive non-instructional workload.
- Faculty advising Coop courses shall receive non-instructional credit for student consultation hours.
- High School Advanced Credit courses are not included in faculty workload calculations.
- Open practice courses will receive non-instructional workload.

(C). Cross-listed courses receive workload hours and contact hours for one of the courses only. The cumulative assigned faculty responsibility for all faculty for all cross-listed CRNs must add to 100%.

(D). **Faculty Involvement Factor (FIF)**. The FIF applies to workload calculations for externship, internship, and graduate projects/theses as a multiplier: **FIF/3**. It accounts for differences in department/program implementation. Except as defined in this article, it is determined by the chair, in consultation with the faculty member, and approved by the Dean at the start of the academic year.

The FIF levels are defined as

- 1 – Faculty involvement is low and not critical, requiring minimal, purely administrative tasks. FIF1 activities carry a (1/3) multiplier.
- 2 – Faculty involvement is minimal but critical, requiring administrative and relationship-building tasks outside of the university. FIF2 activities carry a (2/3) multiplier.
- 3 – Faculty involvement is consistent and required, similar to more traditional coursework in terms of time spent and student contact. FIF3 activities are not adjusted.
- 4 – Faculty involvement is considerable and possibly individualized but may be more or less significant at different times throughout the internship/externship/project/thesis experience. FIF4 activities carry a (4/3) multiplier recognizing faculty involvement above and beyond traditional coursework or to provide an incentive for faculty working in areas the university wants to develop.

(E). **Externship/Internship Workload**. Workload for externships and internships is calculated using the following model. Workload for externships and internships is **0.5 IWLU per student per term x FIF multiplier** with a minimum of 1 IWLU and maximum of 24 IWLU granted per term per bargaining unit member.

Departmental FIF

- MIT - FIF4
- COM - FIF2
- MLS - FIF4
- DH - *tbd*
- RCP - *tbd*
- PSY – FIF3

(F). **Graduate/Thesis Projects**. Faculty supervising graduate projects or theses are granted **1/2 x number of students x credits x FIF**.

(G). **Independent Studies/Reading and Conference Courses**. There may be times when it is necessary to accommodate students with special interests, needs, or when course schedules do not permit students to take a required course. Independent Studies/Reading and Conference Courses are designed to fill this need. As these courses typically have less than 10 students, it is required that the Deans approve offering these courses.

Workload units are based on the following: **1/4 (.25) WLU per student each term**

(H). **Overlapping Contact Hours.** Overlapping contact hours are adjusted so that duplicate contact workload credit is not given to the instructor.

(I). **Shared Courses.** Based on information received from the instructors sharing a course, percentage of responsibility is determined. The total workload hours for the course is apportioned based on this, with the total not to exceed 100% of the total course workload.

When multiple instructors are required to be concurrently present during the course by an accreditation board, the workload units are adjusted to reflect full workload according to the scheduled instruction hours of the class. The adjusted workload will be determined by the Department chair subject to the Dean's approval.

(J). **Special Committees and Assignments.** The following university positions are granted release time, as listed below.

- Faculty Senate President – 0.25 FTE per academic term.
- CPC Chair – 0.25 FTE for one term.
- Assessment Commission Chair – 0.25 FTE for fall quarter.
- CCT Chair – 0.25 FTE per term.
- FAR – 0.25 FTE per term.

Section 8. Overload. Any instructional workload beyond 36/40 IWLUs for 9-month TT/NTT-faculty or 48/56 IWLUs for 11- or 12-month TT/NTT faculty is considered overload. Overload assignments shall never be mandatory and shall always be compensated.

Overload is mutually agreed upon between the bargaining unit member and the Department Chair or appropriate administrative supervisor up to 4 IWLUs per term. The Dean must approve overload beyond 4 IWLUs per term, excluding internship/externship credits. The university shall document overload assignments and make that documentation available to the bargaining unit member. No bargaining unit faculty member may be disciplined, retaliated against, or terminated for refusing an overload assignment.

Section 9. Student Consultation Hours. A bargaining unit member with a 1.0 FTE appointment shall establish and maintain a minimum of five (5) scheduled student consultation hours per week in their offices outside of class, each term they are teaching (or proportionally fewer hours for those with lower assigned instructional loads).

Section 10. Student Advising. Recognizing the importance of student advising and its place among the principal responsibilities of all bargaining unit members, the Department Chair or appropriate administrative officer, with approval from the Provost, will assign advisees to tenured and tenure-track bargaining unit members. Non-tenure track bargaining unit members may be assigned advising duties.

Student advising will be regarded as NIWL up to 40 active students, beyond which advising will be compensated using a stipend model, as per Article 18: Compensation. Student calculation will be based on week 5, Winter term advisee numbers.

Section 11. Summer Term. For nine (9) month bargaining unit members, Summer Term appointments are for varying lengths of time and are additional appointments when program needs and available resources provide opportunities for summer employment. Summer Term appointments are recommended, and mode of course delivery assigned, and approved by the Dean and the Provost. Bargaining unit members who indicate a willingness to accept a Summer Term appointment and are qualified to teach the course(s) offered, will be offered the appointment before an individual outside of the bargaining unit.

Section 12. Course Modality and Capacities. Course capacity and instructional modality of any course shall be determined by the Department Chair or appropriate administrative officer, agreed to by the bargaining unit members, and approved by the College Dean. Within a year of ratification of this contract, departments shall identify maximum acceptable course capacities for all courses that they offer. Course capacity and instructional modality shall be clearly communicated to bargaining unit members at the time of course scheduling and may be revisited no later than thirty (30) calendar days prior to the start of an academic term.

Section 13. Definitions. The following definitions are used for the purposes of this Article

Academic Year. Academic year shall consist of three (3) 11-week terms and the submission of final grades each term but not including scheduled holidays.

Summer Term. Summer Term is the time that occurs between the end of the spring term on or about June 15th and the start of the fall term on or about September 15th.

Work Year. For nine (9)-month faculty the work year shall consist of three (3) 11-week terms including two weeks before the beginning of the academic year beginning on or around September 15th and one week following each academic term ending on or around June 15th but not including scheduled holidays, Thanksgiving Break, Winter Break and Spring Break, as defined by the current academic calendar.

For twelve (12)-month faculty the work year shall consist of twelve (12) months but not including scheduled holidays. A 12-month bargaining unit member who wishes to take breaks between terms shall use accrued vacation time.