Meeting Agenda  
Wednesday, October 7, 2015 3:00 – 5:00 p.m.  Virginia Dare Room, Alumni House

3:00 p.m.  
Call to Order and Introductory Remarks, Anne Wallace, Chair of the Faculty Senate

3:10 p.m.  
Approval of Minutes, Jim Carmichael, Secretary of the Faculty Senate  
Minutes of the September 2, 2015 Faculty Senate Meeting (Enc. A)

3:15 p.m.  
Remarks, Franklin Gilliam, Jr., Chancellor

3:25 p.m.  
Remarks, Dana Dunn, Provost and Executive Vice Chancellor

3:40 p.m.  
Committee Reports/ Presentations  
Beth Bernhardt, Chair, Scholarly Communications Committee: Oct 28 SCC Forum (Enc. B)  
Raymond Carney, Chair, State Employees Combined Campaign

4:00 p.m.  
Presentations  
Ad Hoc Committee on Faculty Workload Guidelines, Revision Report (Enc. C)  
Revised Faculty Workload Guidelines (Enc. D)  
Track Changes Faculty Workload Guidelines (Enc.E)  
Bruce Kirchoff, chair; Joy Bhadury, Susan Collins, Steve Yarbrough  
Discussion

4:55 p.m.  
New Business/Old Business  
Anne Wallace, Faculty Senate Chair

Adjourn

UPCOMING EVENTS:  
Next meeting of the UNCG Faculty Senate is Wednesday, November 4, 2015  
3-5p Alumni House, Virginia Dare Room  
Agenda items due by October 20, 2015, 5:00p

Refreshments are available at 2:30 p.m. for Senators to meet and greet faculty colleagues.  
NOTE: We encourage Senators, non-voting faculty and visitors to speak upon being recognized by the Senate Chair.

Sign Language Services provided as needed and requested (please allow 72 hours) by:  
Communications Services for the Deaf and Hard of Hearing.  
Contact: 336-275-8878 for Faculty Senate Office, 336-334-5345/mlwolfe@uncg.edu
Minutes
Wednesday, September 2, 2015       3:00 – 5:30 p.m.       Virginia Dare Room, Alumni House

Call to Order and Introductory Remarks
Anne Wallace, Chair of the Faculty Senate

The Chair welcomed the assembly and introduced the officers of the Senate and Mary Lea Wolfe. She then addressed the chamber:

This new year at UNCG offers such tremendous potential. The energy and optimism rising on our campus was audible and visible at the State of the Campus gathering on August 12. Acting Chancellor and Provost Dana Dunn, to whom we owe so much, and Chancellor-Elect Frank Gilliam, from whom we hope so much, each drew enthusiastic applause from the audience filling Aycock Auditorium. As we approach our 125th year, our hopes are high.

This means, of course, that there's a lot of work ahead of us. Strategic Planning begins in earnest now—and let me pause to thank Donna Nash, newly elected to Senate, for generously agreeing to take my place as a representative of Faculty Senate on the Strategic Planning Committee. While it's often good for the Chair to represent us in university committees, task forces, and so forth, I think there's a lot of value in spreading this representation among the Senators: more voices are heard, more perspectives brought to the various tables.

Today we'll be hearing from AC Dunn about revising our Faculty Workload Guidelines, a matter that is obviously of great interest to this body and to the General Faculty, and I'll be talking about Senate's participation in that process. This is just one of the many issues and policies, large and small, which will be discussed in Faculty Senate this year. I tried to enumerate the ones I know about—and gave up, not wanting either to leave out something important or to go through the whole list. I've been meeting one-on-one with the chairs of the Senate Committees, a tradition Spoma started last year, and how helpful that has been to me. There's the pleasure of meeting each of the chairs, of course, but it's also been a terrific learning tool for me. I've begun to feel acquainted with the full range of work that faculty undertake to support the University, studying issues, drawing up policy and helpful reports, maintaining open lines of communication, and recommending action. From the Undergraduate Curriculum, to Research Grants, to Intercollegiate Athletics—you got an issue, we got the Committee!

There are many committees, and we're all grateful to the faculty members who agree to serve on them. Should we have so many? Do their functions overlap in ways that might allow us to streamline? Spoma began to investigate this last year, but other business overwhelmed us. I would like to approach this issue again, perhaps gearing up toward the end of this year for a review by each committee of their work and by the Senate as a whole of our committee structure. Stay tuned.

It took me longer than I'd planned to meet with our committee chairs and to generally get Senate business underway. I had foot surgery over the summer, and I'm here to tell you that it slows you down, literally, a lot. I spent a lot of time sitting on my back deck, and I learned a lot out there. Did you know rabbits each kudzu? They mow through the leaves with great relish, and pull the long vines into their mouths like pieces of spaghetti. I also learned that hummingbirds regard my wind chimes as wasted space. Hovering disapprovingly, they make it perfectly clear that there should be a nectar feeder there. I can understand their perspective.

I think a lot about perspectives, of course. It's often said, and it's hard to deny, that faculty seem to take a very, very long time to study and deliberate and decide on almost every issue that comes before us. I've usually attributed this to the fact that, well, we're faculty: we're trained skeptics, professional critics, and we'd be denying our own nature (and, I'd argue, our value) to do otherwise. But there's another reason, I think. Faculty share many concerns and values, of course. But there is a sense in which there is no such thing as "faculty," if what that means is some monolithic, homogeneous group. Every individual faculty member brings a unique collection of perspectives to our work. The disciplines to which we've chosen to devote our lives—the circumstances of our hiring and employment—the size and character of our departments and units—the kinds of students we teach, the skills and ideas we teach them—all of these are as various as the faces in this room.

What we do share, as faculty, includes a commitment to preserving that characteristic individuality, and
the intellectual autonomy of that unique individual. On that ground, we surely meet. But as we work, for that very reason, we have no choice but to hear each voice and try to gain each new perspective. And that takes time.

I hope each of you, faculty and guests at our meetings, will add your voices to our many conversations. The Senate chamber is a place of debate, and of understanding, a place of community and of civil dissent. Please, lift your own voice to express your values and ideas, so that we can move on through this year from great promise, to great accomplishment.

Approval of Minutes

Jim Carmichael, Secretary of the Faculty Senate:

The Secretary called for motion to approve the minutes of May 6, 2014. So moved and seconded. Minutes approved. He also called attention to the year-end committee reports which have been posted to the Senate web page. These are useful for new committee members as a record of the nature of the committee’s work.

Remarks

Frank Gilliam, Jr., Chancellor-Elect:

Thanks to Interim Chancellor Dunn for keeping the campus together and for giving me wise counsel as I begin to learn my way. I have three subjects I would like to address today: 1) my experience with shared governance; 2) what I call the median faculty member; and 3) strategic planning.

Experience with Shared Governance: I have 29 years in the University of California system where there is a tradition of strong shared governance. I have experience that tradition, of which I am a strong proponent, birth as a faculty member and as a chair of committees and as an administrator. I have seen the good, the bad, and the ugly. To me, shared governance is the role of the faculty in advising administration on matters primarily academic, from curriculum to workload to how we promote ourselves. I was a pain in the tuchas to the administration. There is always healthy tension in how one defines the parameters of faculty and administrative responsibility. We will work our way through how we understand those parameters.

Median Faculty Member: What was it for me to do anything? How do I approach those things? Think about how we develop incentives to make it worth your while to do those things and still get done what I need to get done. How will the things I do as Chancellor look to the median faculty member? It is my job to do what is best for the whole campus. I am the only one who has that responsibility.

Strategic Planning: Strategic planning was under way when I got here. Forty-six stakeholder groups are involved. I have been reviewing their work with the planning committee that synthesizes the resulting data. The goal is to come up with an elegantly simple conceptual framework and focus areas, and ask each of the units to fold up their work in that.

My idea is to aspire to be the best regional university in the country. I have no global ambitions. We can’t be Harvard – they were founded in 1638! We can offer, however, a world class educational experience and employ world class research to explore this broader region. We can be the best in the region and the best in the country at it, meanwhile emphasizing the accessibility of our education and research to the region and beyond. I will be seeking input from faculty and staff about this idea in the next several months. Can we help you teach your classes? Can we help you build your programs? One thing we can do is support merit raises for all faculty, and counter the trend in the state to pit K-12 against higher education.

The Chancellor-Elect then fielded questions: He assured the Senate that he was mindful of cost burdens on families and students. Fund-raising will be aimed at scholarship/fellowship money. He also assured the Senate that he was conscious of our excellent record as teacher/scholars, i.e., bringing research into the classroom.

Remarks

Dana Dunn, Acting Chancellor, Provost, and Executive Vice Chancellor:

Welcome back! I just have a few brief points.

1) I care very deeply about having a diverse faculty at UNC Greensboro. We have rich diversity in our student body, but have actually seen a decline in ethnic diversity in our faculty since 2011. Every year for the last many years the Diversity and Inclusion committee has developed recommendations that we address this issue. One of their recommendations has been that we develop training for searches designed to generate diverse candidate pools and hires. I spent time this past summer (with the help of talented instructional designers in DCL) putting together an online module designed for this purpose. It
has been previewed by Deans and several members of the diversity and Inclusion committee. While the module can certainly be improved (and will be for next year with the input from the brief survey at the end), it’s ready for use this year. All search committee members are asked to complete this module. The time required should be only about 30 minutes. I welcome your feedback to make this better. The link is https://uncg.instructure.com/courses/14247

2) Enrollment is up at census by 751 students to a total of 19398. We are up about 5% overall at the undergraduate level and down less than a percent at the graduate level. We are up 4.15% in credit hours, the basis of our funding. This bodes well for our new budget when the legislature passes one. The latest continuing resolution has a date of September 18.

3) There was much confusion this past summer when UNCGA elected to change the tier on chancellor compensation for UNCG, moving us from tier 2 to tier 3. This was done at the May BOG meeting just prior to the appointment of Chancellor Gilliam. The change was for the purpose of Chancellor compensation only, and resulted from a recent compensation analysis study carried out by external consultants. They considered the factors that are commonly used in executive compensation (e.g., size of institution, cost of living) and set new ranges for all Chancellors. What is most important to note is that this had nothing to do with our Carnegie designation—we are still in the Research High Activity category and our peers in the UNC system have not changed.

4) Coache faculty survey data has just arrived. I will present preliminary findings at the September 16 convocation, then make the full data available to the faculty. There is much information and I suspect we will be mining it for some time. I will announce next steps at convocation. They will include constituting a task force of faculty to work to identify actionable items for improvement and to recommend steps to be taken.

Committee Briefs
Stoel Burrowes, Election Committee Chair
We still have vacancies on two committees. We need two people on the Honorary Degrees Committee. The nominations must be received by September 18 to be voted on by October 7, we may resort to an electronic vote. We also need a Secretary for the General Faculty. This slipped by last year because there was no year-end General Faculty meeting. This must be voted on by the September 11 deadline. Please spread the word in your constituencies and encourage people in your units to serve if they are so inclined, and have them e-mail me. The nominations will be announced at the Convocation.

Frank Donaldson, UG Curriculum Committee Chair
Our main work in 2014-15 was streamlining the process of undergraduate new course submission. We had 76 amended courses last year, so we have set up an ad hoc committee on curricular change processes. We are no longer using the standardized course syllabus and instead are relying on revisions with more review by units before going to the university committee. There is a new Form A that is being refined. Changes in the GEC will overlap some changes in UCC.

Presentations
Jim Thornton, Interim Director, University Relations
I have been here since May, and my purpose today is to give you a clear idea of the work University Relations does. By definition, Human Resources exists to tell the UNCG story. There are a variety of key groups, 64 constituent groups in all, and I will briefly describe the functions we fulfill: under Communications, we have publications, media relations, and crisis management; under marketing, we include branding, market research, targeted marketing plans, and advertising; under creative services arte included web design and content management, social media, graphic design and photography.

Mike Harris has done a tremendous job in spearheading the work we do, but in spite of two new hires, we are still understaffed. With Chancellor Frank Gilliam on board, our objective is to reinvent Human Resources, reinstate the Research Magazine and the Alumni Magazine, public audits, initiate celebration of UNCG’s 125th anniversary in July 2016, implement university branding—some of you are already working on this—web site development, social media development, marketing plans, and market research.
We are employing Meltwater News reporting to track the distribution of our information, and Work Zone to list follow-up steps to be taken for every report we produce. We have also created letterhead logos for each school to be used in their email. We ask to be kept in the loop. Contact UR with 1) media releases you are making 2) features or interviews with faculty or staff 3) updates to the experts-on-campus lists and 4) third party media relations or contact reports.

Dana Dunn, Kim Record, Ambrose Jones

NCAA Sanctions

Over the summer we communicated with the campus about the NCAA sanctions imposed on UNCG. The reported violations were self-identified, they were immediately reported, and sanctions were imposed that are designed to strengthen the system of NCAA reporting. The incident did not involve academic fraud, unfair sports advantage, or academically unqualified students. UNCG has owned our mistakes. We have vacated wins and southern conference championships. There is a follow-up compliance review to be submitted. Senate questions concerned specifics of the violations, and Dunn replied that the responsibility for the violation ultimately lies with the Chancellor, in this case, most recently with her. The failure was not a people failure but a process failure. NCAA found no misconduct, but the complexity of the certification process led to the failure of students to check all necessary boxes in the online certification form. Because the discussion had to be cut short to move on to other business, Wallace asked that Senators should send any additional questions to her and she would send them on to Record and Jones. Wallace also said that if there was a feeling that this issue should be revisited in Senate, she would include it again in a future agenda.

Dana Dunn and Anne Wallace, Faculty Workload Guidelines

The year before Dunn arrived, UNCG revised the Faculty Workload Guidelines, and were turning it into general Administration when she arrived almost a full year later. In early June Junius Gonzales at GA asked for further revision and more transparency in the document, including a specific process for monitoring faculty workloads. At last, we now have reasonably accurate faculty instructional workload data, although historical data may be inaccurate. In October, the data will be published. After the September 24, CAO meeting we will know more about what other campuses do in the calculation of workload and what GA will allow so that we have some clarity and guidance about what justifies course reduction. Reductions are most often granted for research and graduate supervision, but not service. Senators job will be to record our reactions and reflections along with an accurate revision of the policy. [Dunn] So that Faculty Senate can make clear, specific recommendations for further revision of the Guidelines, Wallace will appoint an Ad Hoc Committee on Faculty Guidelines Revision. Bruce Kirchoff will chair and Steve Yarbrough will continue from the informal working group that discussed this process this summer. The ad hoc Committee will have members from each Senate electoral division (plus Kirchoff), with Kirchoff, Yarbrough (CAS) and two other faculty forming the core writing group; five other faculty will act as liaisons to their units, providing feedback to the writing group. Please send suggestions for members to Anne Wallace. The committee's draft recommendations will be ready and distributed by September 30, issues identified before October 7 Senate meeting, and the Senate's approved recommendations for revisions sent to Dunn that same day (October 7). Provost Dunn will give us her proposed revision of the Guidelines (drawing on a wide range of recommendations including those of Faculty Senate) by October 14, and we will have 3 days for a final review and any further recommendations. Because of the short timeline, this final review will be carried out by the core writing group of the ad hoc Committee. [Wallace]

Call to extend meeting 10 minutes. So moved. Seconded. Passed.

Questions concerned non tenure track stream, whether there was a minimum class size, a distinction between undergraduate and graduate hours (none), and where our data comes from.

Adjourn

Move to adjourn. Seconded. Adjourned.

Respectfully submitted,

Jim Carmichael
Secretary, Faculty Senate Secretary
FACULTY SENATE SCHOLARLY COMMUNICATIONS FORUM

October 28th
3:30 – 5:00
Alexander Room - EUC

Rights and Responsibilities of Authors: Understanding Copyright and Open Access in Modern Scholarly Publishing

Come join Christine Friun, J.D., MSLIS from University of Florida to learn how to preserve your rights as an author
Recommendations of the Faculty Senate Ad-Hoc Committee on Revision of the Faculty Workload Guidelines

Bruce K. Kirchoff, Chair

Members: Joy Bhadury (Bryan School), Stephen Yarbrough (College), Susan Collins (Nursing)

Faculty Liaisons: Dennis LaJeunesse (JSNN), Colleen Fairbanks (School of Education), Deborah Bell (School of Music, Theater & Dance), Joi Bulls (HHS)

As instructed in the Committee’s charge by Anne Wallace, Chair of the Faculty Senate, the Ad-Hoc Committee hereby submits to the Senate and Provost the attached revision of the UNCG Faculty Workload Guidelines.

Background

On June 3, 2015, Junius Gonzales, Senior Vice President for Academic Affairs, sent UNCG Provost Dana Dunn a memorandum asking her to submit a revision of the UNCG Faculty Workload Guidelines which the University had submitted in August 2014. Gonzales explained that UNCG’s policy had met the minimum requirements for this document, but asked Provost Dunn to revise the policy to address the following issues:

- "The current policy has insufficient information regarding overloads–how they are assigned, limits per semester or academic year (per Policy 300.2.13) and how they are approved."
- "Either include or reference your guideline that addresses UNC BoG Policy 700.6.1[R] regarding independent studies."

In addition, Gonzales suggested that UNCG consider “the following overarching framework/principles for further policy refinement/improvement” in addition to the issues the University was required to revise:

- Clear citation of the UNC Policy 400.3.4 about workload standards and indication of the standard for the individual campuses.
- Specified circumstances that could result in a reduced teaching load and detail about limits on reductions based on job title.
- Detailed description of the process for overload and language indicating that such overloads are not common assignments....
- Monitoring language that specified who will monitor as well as how and what will happen as a result.
- Monitoring should encompass all aspects of workload, including independent studies, overloads and course reductions
- Developed approval processes with multiple layers. Chairs should submit to dean for approval. Dean should submit to provost for approval.
- Cross-referenced related campus policies that reside in different locations.

Upon receipt of the Gonzales memorandum, Provost Dunn informed Anne Wallace, and they agreed that the Senate would propose to her a revision that met Gonzales’ requirements, as well as address some additional requirements specified by the Provost.
Over the summer, chair-elect Wallace put together an informal group—comprised of the Senate’s leadership and Bruce Kirchoff—to examine these workload policy issues, and then in early September appointed the Ad-Hoc Committee to complete the work.

On September 18 the Committee provided an initial draft to the Provost and received feedback on changes that she felt were needed. Following this consultation, a number of changes and clarifications were made, including the removal of all reference to departmental teaching loads. Going forward the Provost has asked that all teaching loads be set individually. The Ad-Hoc Committee believes that the current document accomplishes this goal while, at the same time, providing assurance that a faculty members’ total workload is taken into account.

Process

In compliance with our charge, the Ad-Hoc Committee examined the following documents:

1. The revised version of UNCG’s Faculty Workload Guidelines submitted to GA in August 2014;
2. Junius Gonzales’s June 2015 memo detailing required and suggested revisions to this version;
3. The Board of Governors’ policy documents 400.3.4; 400.3.4[R]; and 700.6.1, which address faculty workloads; and
4. The UNC Charlotte Faculty Teaching Load policy, which Provost Dunn noted as achieving a good balance of specific standards and latitude for adjustment by departments and units.

The Committee also examined all the documents cited in the August 2014 Guidelines, checking quotations, and consulted additional UNC System and UNCG policy documents that the Committee deemed relevant.

The Committee then made revisions to the August 2014 Workload Guidelines with respect to the following issues and principles, as specified in our charge:

1. To focus on the sections of the Workload Guidelines then entitled “Workload Assignments,” “Modifications to and Approval of Workload Assignments,” and “Monitoring and Reporting of Teaching Loads.”
2. To address Gonzales’ required changes and consider the suggestions specified by him in his memorandum, making as few changes as possible to the current policy.
3. To consider the work required to implement our suggested changes, and strive to impose the least possible administrative burden.
4. To ensure that the revised Guidelines treat each faculty member’s workload as unique, not susceptible to measurement by a single institutional standard.
5. To ensure that workload guidelines recognize broad categories of contribution in research/creative activity (including community engaged scholarship) and service as well as teaching, and that the revised Guidelines should articulate those categories in ways that promote full recognition for contributions in all areas.
6. To ensure that the revised Guidelines give departments primary responsibility for assigning faculty workloads, with oversight and monitoring of faculty workloads provided by the units (schools and the college) and the Provost’s office.

7. To ensure that the Guidelines neither conflict with the UNCG Annual and Post-tenure Review Policy for Faculty nor impose new formal workload reviews.

In compliance with the Provost’s requests, the Committee also strove to ensure that the revised Guidelines had the following features:

- Faculty teaching workloads should be set at the individual faculty level.
- Faculty teaching workloads should be monitored at the dean and provost levels.
- Clear procedures should be described for how faculty teaching workloads are set and adjusted.

As it seemed proper and necessary, the Committee submitted requests for feedback from several deans, department heads, faculty members, Vice Provost Boyette, and Sarah Carrigan, the Director of Institutional Research.

Revisions

1. Revisions that address Senior Vice President Gonzales’ required changes

   - “The current policy has insufficient information regarding overloads—how they are assigned, limits per semester or academic year (per Policy 300.2.13) and how they are approved.”
     - We added a subsection “V. Course Overloads” on page 6.
   - “Either include or reference your guideline that addresses UNC BoG Policy 700.6.1[R] regarding independent studies.”
     - We added reference to our policy on Independent Studies, to the section IV.F Relationship to other UNCG policies

2. Revisions that address Senior Vice President Gonzales’ suggested changes

   - Clear citation of the UNC Policy 400.3.4 about workload standards and indication of the standard for the individual campuses.
     - This policy was already cited in our Faculty Workload Guidelines. We have retained these citations and clarified the citations in several other places.
   - Specified circumstances that could result in a reduced teaching load and detail about limits on reductions based on job title.
     - Sections IV.C and IV.D were added to clarify how these reductions are handled at UNCG.
   - Detailed description of the process for overload and language indicating that such overloads are not common assignments....
     - Section V. Course Overloads was added to the Guidelines
   - Monitoring language that specified who will monitor as well as how and what will happen as a result.
o Dr. Gonzales memo used our policy as an example of the type of language to include. At the request of the Provost we also added Section VI. Monitoring of Teaching Workload.

- Monitoring should encompass all aspects of workload, including independent studies, overloads and course reductions
  - Section VI. Monitoring of Teaching Workload, includes monitoring of all of the required aspects.
- Developed approval processes with multiple layers. Chairs should submit to dean for approval. Dean should submit to provost for approval.
  - We included language that makes it clear that the heads/chairs work with faculty to set teaching loads under the supervision of the deans, and that the heads/chairs and deans monitor teaching loads at their respective levels (department/unit). We also specified that the dean must approve any modifications to a faculty member’s teaching load that deviates from the department’s workload policy (Section IV.C.5).
- Cross-referenced related campus policies that reside in different locations.
  - Section X, Related Policies and Regulations, cites and links to all of the relevant policies at the university and system level.

3. Revisions that address the Provost’s requirements

a. The requirement that faculty teaching workloads should be set at the individual faculty level is mentioned and/or addressed in several places:

- Section IV.A: “individual workload assignments must allow for both flexibility and maintenance of UNCG’s commitment to instructional productivity and academic excellence”
- Section IV.B: “, individual faculty teaching loads are best managed at the department and school level... (UNC Policy 400.3.4).”
- Section IV.C.2: “heads/chairs, in consultation with the affected faculty member and under the supervision of their dean, make individual assignments and adjustments to assignments . . . .”
- Section IV.C.2d: “The understanding that individual teaching loads . . . .”
- Section IV.D.1: “make individual assignments and adjustments to assignments . . . .”
- In addition, all references to department-level teaching loads have been removed from the revised Guidelines.

b. The requirement that faculty teaching workloads should be monitored at the Dean and Provost levels:

- Section VI Monitoring of Teaching Workloads was added to the document

c. The requirement that there should be clear procedures for how faculty teaching workloads are set and adjusted.

- Sections IV.C and D address this requirement.

4. Other revisions, discussed by section
Throughout the whole document
  o Section numbers have been added.
  o The term “teaching loads” has been changed to “teaching workloads” to be consistent with UNC Policy 400.3.4.

I. Purpose
  o The references to UNCG documents have been corrected.

II. Scope
  o The text was simplified, and reference to unit and departmental workload policies was added. It is important to note that some units (Business) only have unit policies, and some (Nursing) have neither unit nor departmental policies.

IV. Guidelines, Section A
  o Aside from a few changes in wording, clarification of UNC Policy 400.3.4 was added based on text provided by the Provost.

IV. Guidelines, Sections B - E
  o These sections are almost entirely new. These sections attempt to balance the university’s need to meet its educational goals, with the faculty’s legitimate desire to work in a supportive, stress-free atmosphere.
  o In order to create policies that apply to the many diverse types of faculty appointments at the University, the Committee created separate sections for tenure-track/tenured and non-tenure track faculty. The diversity of roles assigned to non-tenure track faculty made it necessary to keep the statements in this section very general.

IV. Guidelines, Section F: Relationship to other UNCG Policies
  o This is a new section which brings together several provisions of the old document and adds some clarifications on the relationships between these workload guidelines, The Annual and Post-Tenure Review Policy for Faculty, and the University Wide Guidelines for Promotion and Tenure.
  o The relationship to our independent studies policy, which specifies the maximum number of independent studies that a faculty member may teach each semester, is referenced here. The Ad-Hoc Committee did not repeat the independent studies policies here because doing so would create a dependency between these documents, so that if there was a policy change both documents would have to be modified.

V. Course Overloads
  o This new section is required by GA.
  o The Committee has attempted to give clear directions on what constitutes an overload, without creating the impression that there is a minimum number of courses that have to be taught by Tenured/Tenure-Track faculty.

VI. Monitoring of Teaching Workload
This new section was written with input from Sarah Carrigan, the Director of Institutional Research.

- VII. Reporting of Teaching Workload
  - This section was taken with very little modification from language provided by the Provost.

- VIII. Evaluation and Reward of Teaching
  - This section is largely unmodified from UNCG’s existing workload policy.

- IX. Periodic Review of Policy
  - This section is largely unmodified from UNCG’s existing workload policy.

- X. Related Policies and Regulations
  - A few additional policies the document refers to were added to this list.

- Footnotes
  - Old footnote 1 dates from a time before all of the academic units were divided into departments and so is no longer relevant. It has been removed.
  - New footnotes 1 & 3: These footnotes make it clear that these Guidelines do not apply to the University Libraries, as teaching is not a primary duty of the faculty members in the libraries.
  - New footnote 6 refers to UNC Policy on the supervision of graduate teaching assistants.
  - New footnote 7 is needed to cover the (rare) cases where a tenured faculty member has accepted a 4/4 load in lieu of assuming research/service obligations.
I. Purpose

UNC Policy 400.3.1.1[G], *Guidelines on Teaching and Tenure in the University of North Carolina*, states: "each institution should view teaching as a core requirement. The board states in its long-range plan that teaching or instruction is the primary responsibility of each of the UNC institutions. Thus while neither teaching nor service nor research is the sole measure of a faculty member’s competence and contribution at any UNC institution, teaching should be the first consideration at all of the UNC institutions." The University of North Carolina at Greensboro (UNCG) strives for excellence in the fulfillment of its broad instructional, research, and service mission. This longstanding commitment is evident in academic programming choices, research agendas, outreach efforts, resource allocation decisions, and official statements of institutional priorities. UNCG’s *University Wide Evaluation Guidelines for Promotions and Tenure* (Evaluation Guidelines) acknowledge and value the diversity of faculty roles and responsibilities within the University and enforce a responsiveness to the variety of these contributions in the evaluation of faculty for promotions and/or tenure. The Evaluation Guidelines endorse diversity in evaluation models by which faculty members are assessed, rather than compelling a diverse faculty to conform to a single performance model.

As a public institution, UNCG is also held accountable by the Legislature, Board of Governors, and President for a variety of outcomes, including those related to faculty instructional productivity. UNC Policy 400.3.4, *Monitoring Faculty Teaching Workloads*, requires all UNC institutions to develop and implement policies and procedures to monitor faculty teaching workloads and to approve significant variations from expected minimums. Policies must include the criteria and approval process for reductions in instructional load attendant to increased administrative responsibilities, externally-funded research, including course buy-outs, and service obligations.

UNC Policy 400.3.4 also requires that annual faculty performance evaluation policies be implemented at UNCG and that they evaluate and reward all aspects of faculty workload, separately and in combination, consistent with the instructional mission. UNCG’s *Annual and Post-Tenure Review Policy for Faculty* outlines a review process for annual and post-tenure evaluation of faculty performance intended to promote faculty vitality and to reward faculty by recognizing, encouraging, and rewarding faculty performance by means of merit pay increases, when funds are available for this purpose.
Faculty workloads must therefore be developed with a balance in mind, allowing for a high degree of research/creative expression, service, community engagement, and directed professional activity, while also insuring that instructional needs are met. These Faculty Workload Guidelines have consequently been established to help the University meet these internal goals and external expectations.

II. Scope

Deans, department heads/chairs, and full time equivalent faculty members shall employ these Faculty Workload Guidelines when preparing unit and/or departmental workload guidelines. These Guidelines and unit/departamental guidelines, where these exist, should be referenced when deans and/or department heads/chairs meet with faculty members to complete the UNCG Faculty Workload Assignment Form, and during the annual review of faculty.

III. Definitions

Faculty Workload: The entirety of a faculty member’s duties for the relevant period.

Teaching Workload: The portion of the faculty workload spent on direct instruction and instructional activities.

IV. Guidelines

A. Introduction to UNC Policy 400.3.4

Determining the workload for a specific faculty member requires consideration of a complex variety of variables related to unit and departmental goals, to expectations for instruction, research/creative expression, service contributions, expectations for community engagement, and in some cases, expectations for directed professional activity. In most cases, counting semester hours or the number of organized classes alone fails to reflect the totality of a faculty member’s effort, and is therefore insufficient for the purposes of developing or comparing workload assignments. Within and across departments, Schools, and the College, individual workload assignments must allow for both flexibility and maintenance of UNCG’s commitment to instructional productivity and academic excellence. The resulting assignments, however, must convey recognition of these Faculty Workload Guidelines, and adherence to the faculty workload expectations of the UNC Board of Governors and UNC Office of the President.

1 These Faculty Workload Guidelines do not apply to faculty whose primary appointment is in the University Libraries.

2 Everything in this policy that applies to department heads/chairs also applies to non-departmental program directors.

3 The Schools and the College (excluding the University Libraries) are hereafter, collectively, referred to as the “units” in this document.
The Board of Governors defines its annual standard teaching workload expectation (number of organized class courses, see UNC Policy 400.3.4), by institutional Carnegie classification, as follows, and expects that institutional averages will conform to these standard loads:

- Research Universities I: 4
- Doctoral Universities I: 5
- Masters (Comprehensive) I: 6
- Baccalaureate (Liberal Arts) I: 8
- Baccalaureate (Liberal Arts) II: 8

Given UNCG’s classification as a Doctoral I University, the standard faculty teaching workload is five courses, or the equivalent, per academic year. It is understood, however, that not all faculty will teach the standard load. Loads will vary in accordance with the faculty member’s job title and activity mix. The variation in load across faculty members will result in an institutional average of five organized courses per year per full time equivalent (FTE).

**B. Unit and Departmental Workload Guidelines**

“Given the complexity of faculty work activities, individual faculty teaching loads are best managed at the department and school level... (UNC Policy 400.3.4).” Accordingly, all units must either develop workload policies that are designed to accommodate the needs and mission of the unit, or adopt these Faculty Workload Guidelines as the principles by which workloads are assigned in that unit. Additionally, when deemed appropriate by the dean or faculty assembly of the unit, all departments within a unit must develop workload policies that are designed to accommodate the needs and missions of those departments. Unit and departmental guidelines, where they are developed, must be approved by dean and the faculty of that unit/department, and must not conflict with the principles established in these Faculty Workload Guidelines.

**C. Workload Assignments for Tenured/Tenure-Track Faculty**

1. Total workload for Tenured/Tenure-Track Faculty is equivalent to a teaching workload equal to 24 semester hours of organized class teaching (8 organized courses, or their equivalent) per academic year. For Tenured/Tenure-Track faculty a workload equivalent to a minimum of 6 of these 24 semester hours (2 organized courses, or their equivalent) is normally assigned to research/creative activity.

---

4 “Doctoral Universities I,” a classification included within the 1994 Carnegie Foundation classification of institutions, has been retained for use by the Board of Governors in UNC Policy 400.3.4. UNCG is presently classified within the category of “Research Universities (High Research Activity),” in keeping with Carnegie’s 2010 update of its classification titles.

5 Existing policies need not be retroactively approved.
2. Within the general expectations set in IV.C.1, department heads/chairs, in consultation with the affected faculty member and under the supervision of their dean, make individual assignments and adjustments to assignments, based upon:

a. An overall expectation of the department’s instructional productivity, negotiated annually with the dean and based upon the department’s mission and degree-granting responsibilities;

b. Unit and departmental workload policies, where these exist;

c. The understanding that engagement in research/creative activity as well as service on department, college/school and/or university-wide/Faculty Senate committees is expected as part of the normal responsibilities of a tenure-track faculty member;

d. The understanding that individual teaching loads will be agreed upon after taking into account factors such as, but not restricted to, a faculty member’s:

i. contribution to degree programs including, but not restricted to, the number and level (M.S., PhD) of graduate students supervised, the type of courses taught (including their size), and contributions to course/curriculum development;

ii. scholarly productivity through research and/or creative activity, including involvement in externally and/or internally funded research;

iii. service commitment, including all levels of institutional service, service to the public, and service to the profession;

iv. administrative duties including, but not restricted to, administrating programs or institutes, involvement in accreditation/program review, and overseeing licensure requirements;

v. involvement in co-curricular activities;

vi. academic advising load;

vii. applicable contractual obligations UNCG has made to faculty members;

3. It is also understood that department heads, with the approval of their dean, have the right to adjust the duties and teaching loads of their Non-Tenured, Tenure-Track faculty, subject to the provisions of Section IV.C.2, so that these faculty members are not unnecessarily hindered in their attainment of tenure.

4. Additional course reductions are also permitted when funded by buyouts using external funds, or when an individual has been granted a Research Assignment or other assignment of special responsibilities by a dean or the provost.

---

6 See also UNC Policy 400.3.5.1[G]
5. Any modifications to a faculty member’s teaching load that deviates from the workload policy effective in his or her unit or department, where such policies exist, must be reported to, and approved by the dean.

6. The dean is responsible for maintaining overall equity of total workload among Tenured and Tenure-Track faculty in his or her unit.

D. Workload Assignments for Non-Tenure-Track Faculty

1. Department heads/chairs, in consultation with the affected faculty member and under the supervision of their dean, make individual assignments and adjustments to assignments based upon the following considerations:

   a. Unit and departmental workload policies, where these exist;

   b. The understanding that the teaching workloads of Academic Professional track faculty and Clinical Faculty will vary based on the faculty member’s specific position description, as determined by the unit and/or department.

   c. The standard teaching workload for other (non-Academic Professional or Clinical) full-time, non-tenure-track faculty is 24 semester hours (eight organized courses, or their equivalent) per year. This teaching workload may vary in certain cases, for reasons similar to those given in section IV.C.2.d.

   d. The dean is responsible for maintaining overall equity of total workload among different types of non-tenure-track faculty, and between these faculty and Tenured/Tenure-Track faculty.

E. Assignment of faculty workload (including teaching workload)

   a. Faculty members will receive their assigned annual workload in writing, using the Faculty Workload Assignment Form (which may be modified to meet unit or department-specific needs).

   b. A record of a faculty member’s assigned workload is to be included as part of the documentation for annual reviews, as well as for reappointment, promotion, tenure, and post-tenure reviews.

F. Relationship to other UNCG policies

   a. The UNCG Annual and Post-Tenure Review Policy for Faculty establishes annual and five-year cycles of performance review for faculty. Nothing in these Faculty Workload Guidelines shall be construed as establishing additional review cycles.

   b. UNCG’s University-Wide Evaluation Guidelines for Promotion and Tenure establish acceptable activities for Tenure-Track faculty in the areas of teaching, scholarship and service. Nothing in these Faculty Workload Guidelines shall be construed to
invalidate any of these categories of work, or to diminish the importance of any type of scholarship, teaching or service, including, but not restricted to, community-engaged scholarship.

c. Independent studies must conform to the UNCG Guidelines on Independent Studies, which is attached here by reference. These guidelines comply with Section IV.A of UNC Policy 700.6.1[R], Academic Integrity Regulations.

V. Course Overloads

1. An overload is coursework taught by a full-time faculty member that exceeds the course load expectations expressed below:
   a. 18 semester hour (six organized courses, or their equivalent) per year for Tenured or Tenure-Track faculty members;
   b. the teaching expectations set in their contracts for Academic Professional and Clinical faculty members;
   c. 24 semester hours (eight organized courses, or their equivalent) per year for other (not Academic Professional or Clinical) Non-Tenure-Track faculty members.

2. All overload assignments must conform to the UNC System Supplemental Pay Policy for Employees Exempt from the State Personnel Act (UNC Policy 300.2.13), the UNCG Policy on Compensation Beyond Contract for Faculty and EPA Nonfaculty Employees, and the Guidelines for Implementation of the UNCG Policy on Compensation Beyond Contract for Faculty and EPA Nonfaculty Employees.

VI. Monitoring of Teaching Workload

1. Department heads and academic deans are responsible for monitoring faculty teaching workloads for the faculty under their supervision.

2. Each semester, within two weeks of the fall and spring semester censuses, the Office of Institutional Research (OIR) will provide an Instructional Analysis Report to each department head on the teaching workload for all faculty members in their department. The report will consist of two main sections. Section 1 will include a summary faculty headcount and FTEs, numbers of organized sections, student credit hours generated per organized section, student credit hours generated per individualized instruction, and faculty performance metrics. Section 2 will include a detailed listing of departmental faculty members and the courses they teach. Department heads will review the reports and provide any necessary corrections details for correction in Banner Student or Banner HR. Updated reports will be generated and OIR will send the corrected Instructional Analysis Reports to the academic deans for final review.

---

7 In rare cases a Tenured/Tenure-Track faculty member, whose only duty is teaching, may teach 24 semester hours (eight organized courses, or their equivalent) per academic year and not be considered to be teaching an overload.
3. Once a year, during spring semester, department heads will review Section 2 of the Instructional Analysis Report for their department and add a brief justification for each instructor whose teaching workload falls below 15 semester hours (five organized courses) or their equivalent, per year. These annotated reports will be submitted to OIR with the department’s corrected data (Section VI.2, above). After receiving the corrected reports for their unit, each dean will prepare a written summary of teaching workload of the faculty in their unit and submit this summary to the Provost’s Office.

VII. Reporting of Teaching Workload

The UNC Office of the President requires that each UNC institution participates in the University of Delaware's National Study of Instructional Costs and Productivity (Delaware Study). The Delaware Study provides comparable teaching data at the discipline level using the following faculty categories: regular tenure stream, other regular, supplemental, and teaching assistants (UNC Policy 400.3.4). These data are used to compare departmental instructional productivity of the UNC campuses. Please refer to UNC Policy 400.3.4 for more information. Comparisons with national peer group norms as developed by the Delaware Study are presented for further context. The Board of Governors and President expect that, in comparisons of like departments at peer institutions, UNC campuses will demonstrate acceptable levels of productivity relative to ratios for student credit-hour generation and teaching costs per faculty member. UNCG reports the final fall semester data resulting from the Instructional Analysis Review, described above, to UNC General Administration on an annual basis and regularly evaluates its trends in instructional productivity to assure that it is able to demonstrate these acceptable levels. (Because the Delaware Study is a measure of fall semester instructional productivity only, the teaching workload presented in this Study will generally represent only one-half to three-fifths of the academic year teaching workload.) Please refer to UNC 400.3.4[R] Regulations Related to Monitoring Faculty Teaching Workloads for more information.

VIII. Evaluation and Reward of Teaching

UNCG’s Annual and Post-Tenure Review Policy for Faculty provides guidance on the purpose and process of annual evaluation of faculty performance intended to promote faculty vitality. Annual reviews apply to all faculty members, whether Tenured, Tenure-Track, Non-Tenure-Track, paid or unpaid (including Lecturers, Clinical Faculty, Academic Professional Faculty, or other “special faculty members,” as outlined in Section 610 of the UNC Policy Manual).

The purposes of Annual and Post-Tenure reviews, as outlined in UNC 400.3.3 and 400.3.3.1[G], are to:

- Sustain and facilitate excellence among Tenured and Tenure-Track faculty by recognizing, encouraging, and rewarding faculty performance;
- Foster faculty development by evaluating all aspects of professional performance, by acknowledging progress in specific areas, and by identifying specific activities that can be undertaken if improvement is needed.
The evaluation and reward of teaching take place in the context of an overall evaluation of a faculty member’s entire professional performance.

IX. Periodic Review of Policy

Changes to these Faculty Workload Guidelines will be submitted to the Faculty Senate for comment before being approved by the Chancellor.

X. Related Policies and Regulations

UNCG Promotion, Tenure, Academic Freedom and Due Process Regulations

UNCG Annual and Post—Tenure Review Policy for Faculty
http://provost.uncg.edu/documents/personnel/posttenurereview.pdf

UNC Policy 300.2.1—Employees Exempt from the State Personnel Act
http://www.northcarolina.edu/apps/policy/index.php?pg=vs&id=269&added=1

UNC Policy 400.3.3 – Performance Review of Tenured Faculty
http://www.northcarolina.edu/policy/index.php?tag=400.3.3

UNC Policy 400.3.3.1[G] – Guidelines on Performance Review of Tenured Faculty
http://www.northcarolina.edu/policy/index.php?tag=400.3.3.1%5BG%5D

UNC Policy 400.3.4 – Monitoring Faculty Teaching Workloads
http://www.northcarolina.edu/policy/index.php?tag=400.3.4

UNC Policy 400.3.4[R] - Regulations Related to Monitoring Faculty Teaching Workloads

UNC Policy 400.3.5.1[G] - Guidelines on Training, Monitoring, and Evaluating Graduate Teaching Assistants

UNCG Faculty Workload Policies
http://provost.uncg.edu/publications/personnel/workloads.asp

UNCG Guidelines on Independent Studies

UNCG Policy on Compensation Beyond Contract for Faculty and EPA Nonfaculty Employees

UNCG Guidelines for Implementation of the UNCG Policy on Compensation Beyond Contract for Faculty and EPA Nonfaculty Employees
https://web.uncg.edu/hrs/Class_Comp/compensation_guidelines.pdf
Faculty Workload Assignment Form
http://provost.uncg.edu/documents/personnel/Assignment_Form.doc

Policy Administrator

Office of the Provost
FACULTY WORKLOAD GUIDELINES
THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO

(Approved by the Chancellor, April 3, 2002)
(Amended August 25, 2014; Approved by the Chancellor, August 26, 2014)

(Appended October ***, 2015; Approved by the Chancellor, October ***, 2015)

I. Purpose

UNC Policy 400.3.1.1–[G], Guidelines on Teaching and Tenure in the University of North Carolina, states: "each institution should view teaching as a core requirement. The board states in its long-range plan that teaching or instruction is the primary responsibility of each of the UNC institutions. Thus while neither teaching nor service nor research is the sole measure of a faculty member's competence and contribution at any UNC institution, teaching should be the first consideration at all of the UNC institutions." The University of North Carolina at Greensboro (UNCG) strives for excellence in the fulfillment of its broad instructional, research, and service mission. This longstanding commitment is evident in academic programming choices, research agendas, outreach efforts, resource allocation decisions, and official statements of institutional priorities. UNCG's Promotion, Tenure, Academic Freedom, and Due Process RegulationsUniversity Wide Evaluation Guidelines for Promotions and Tenure (Evaluation Guidelines) acknowledge and value the diversity of faculty roles and responsibilities within the University and enforce a responsiveness to the variety of these contributions in the evaluation of faculty for promotions and/or tenure. The Regulations Evaluation Guidelines endorse diversity in evaluation models by which faculty members are assessed, rather than compelling a diverse faculty to conform to a single performance model.

As a public institution, UNCG is also held accountable by the Legislature, Board of Governors, and President for a variety of outcomes, including those related to faculty instructional productivity. UNC Policy 400.3.4, Monitoring Faculty Teaching Workloads, requires all UNC institutions to develop and implement policies and procedures to monitor faculty teaching loads workloads and to approve significant variations from expected minimums. Policies must include the criteria and approval process for reductions in instructional load attendant to increased administrative responsibilities, externally-funded research, including course buy-outs, and additional institutional and departmental service obligations.

*In the case of non-departmentalized academic units, the word "division" may be substituted for the word "department" throughout this document. In addition, for non-departmentalized units, the dean assumes the role of the department head. Finally, the term "department head" is used generically to identify the administrative supervisor of an academic department or division, and is therefore synonymous with "department chair."
UNC Policy 400.3.4 also requires that annual faculty performance evaluation policies be implemented at UNCG and that they evaluate and reward all aspects of faculty workload, separately and in combination, consistent with the instructional mission. UNCG’s Annual and Post-Tenure Review Policy for Faculty outlines a review process for annual and post-tenure evaluation of faculty performance intended to promote faculty vitality and to reward faculty by recognizing, encouraging, and rewarding faculty performance by means of merit pay increases, when funds are available for this purpose.

Faculty workloads must therefore be developed with a balance in mind, allowing for a high degree of research/creative expression, service, community engagement, and directed professional activity, while also insuring that instructional needs are met. These Faculty Workload Guidelines have consequently been established to help the University meet these internal goals and external expectations.

II. Scope

Deans, department heads/chairs, and full time equivalent faculty members shall employ these Faculty Workload Guidelines when faculty assignments are discussed and developed. The departmental workload guidelines, where these exist, should be referenced when deans and/or department heads/chairs meet annually with faculty members to complete the Faculty Workload Assignment Form and participate in their UNCG Faculty Workload Assignment Form, and during the annual review. Both documents reflect serious concern for both equity and accountability. It may also be helpful to refer to both of these documents at the end of the academic year when completing either the generic or unit-specific UNCG Annual Review Report Form.

III. Definitions

Faculty Workload: The entirety of a faculty member’s duties for the relevant period.

Teaching Load: The portion of the faculty workload spent on direct instruction and instructional activities.

IV. Guidelines

A. Introduction to UNC Policy 400.3.4

2 These Faculty Workload Guidelines do not apply to faculty whose primary appointment is in the University Libraries.
3 Everything in this policy that applies to department heads/chairs also applies to non-departmental program directors.
Determining the workload for a specific faculty member requires consideration of a complex variety of variables related to the department, unit and departmental goals and to expectations for instruction, research/creative expression, service, contributions, expectations for community engagement, and in some cases, expectations for directed professional activity. In most cases, counting semester hours or the number of organized classes alone fails to reflect the totality of a faculty member’s effort, and is therefore insufficient for the purposes of developing or comparing workload assignments. Within and across departments, schools, and the College, individual workload assignments must allow for both flexibility and maintenance of UNCG’s commitment to instructional productivity and academic excellence. The resulting assignments, however, must convey recognition of the Faculty Workload Guidelines stated for UNCG and adherence to the faculty workload expectations of the UNC Board of Governors and UNC Office of the President.

Reflecting the fact that the University is funded on the basis of the number of student credit hours generated annually, the UNC Board of Governors has stated its general expectations regarding faculty workload practices at the campus level. For example, the Board defines its annual standard teaching load (see UNCG Policy 400.3.4), by institutional Carnegie classification, as follows, and expects that institutional averages will conform to these standard loads:

- 4 courses at Research I Universities; I: ______ 4
- 5 courses at Doctoral I Universities; I: ______ 5
- 6 courses at Masters (Comprehensive) I Universities; ______ 6
- 8 courses at Baccalaureate and (Liberal Arts) I & II: ______ 8
- Baccalaureate (Liberal Arts) II Universities: ______ 8

It is understood, however, that teaching workloads within a university will differ by department and are dependent upon the level of degree offered.

Given UNCG's classification as a Doctoral I University, the standard faculty teaching workload is five courses, or the equivalent, per academic year. It is understood, however, that not all faculty will teach the standard load. Loads will vary in accordance with the faculty member’s job title and activity mix. The variation in load across faculty members will result in an institutional average of five organized courses per year per full time equivalent (FTE).

---

4 The Schools and the College (excluding the University Libraries) are hereafter, collectively, referred to as the “units” in this document.

5 “Doctoral Universities I,” a classification included within the 1994 Carnegie Foundation classification of institutions, has been retained for use by the Board of Governors in UNC Policy 400.3.4. UNCG is presently classified within the category of “Research Universities (High Research Activity),” in keeping with Carnegie’s 2010 update of its classification titles.
B. Unit and Departmental Workload Guidelines

“Given the complexity of faculty work activities, individual faculty teaching loads are best managed at the department and school level… (UNC Policy 400.3.4).” Accordingly, all units must either develop workload policies that are designed to accommodate the needs and mission of the unit, or adopt these Faculty Workload Guidelines as the principles by which workloads are assigned in that unit. Additionally, when deemed appropriate by the dean or faculty assembly of the unit, all departments within a unit must develop workload policies that are designed to accommodate the needs and missions of those departments. Unit and departmental guidelines, where they are developed, must be approved by dean and the faculty of that unit/department,6 and must not conflict with the principles established in these Faculty Workload Guidelines.

C. Workload Assignments for Tenured/Tenure-Track Faculty

1. Department Total workload for Tenured/Tenure-Track Faculty is equivalent to a teaching workload equal to 24 semester hours of organized class teaching (8 organized courses, or their equivalent) per academic year. For Tenured/Tenure-Track faculty a workload equivalent to a minimum of 6 of these 24 semester hours (2 organized courses, or their equivalent) is normally assigned to research/creative activity.

2. Within the general expectations set in IV.C.1, department heads/chairs, in consultation with the affected faculty member and under the supervision of their dean, make individual assignments and adjustments to assignments, based upon:

   a. An overall expectation of the department’s instructional productivity, negotiated annually with the dean and based upon the department’s mission and degree-granting responsibilities;

   b. Consideration of the guidelines for individual teaching assignments; and,

   b. Consideration of the differential weightings of teaching. Unit and departmental workload policies, where these exist;

   c. The understanding that engagement in research, graduate supervision, and/creative activity as well as service activities assigned to the department, college/school and/or being assumed by university-wide/Faculty Senate committees is expected as part of the normal responsibilities of a faculty member in a given year.

   c. In departments that do not offer the doctoral degree, 18 semester hours for each tenured/tenure-track faculty member are generally assigned to teaching;

   d. In departments The understanding that offer the doctoral degree, 15 semester hours are generally assigned to individual teaching loads will be agreed upon after taking into account factors such as, but not restricted to, a faculty member’s:

6 Existing policies need not be retroactively approved.
i. contribution to degree programs including, but not restricted to, the number and hours to dissertation level (M.S., PhD) of graduate students supervised;  
ii. the type of courses taught (including their size), and contributions to course/curriculum development;  
iii. scholarly productivity through research and/or creative activity, including involvement in externally and/or internally funded research;  
iv. service commitment, including all levels of institutional service, service to the public, and service to the profession;  
v. administrative duties including, but not restricted to, administrating programs or institutes, involvement in accreditation/program review, and overseeing licensure requirements;  
vi. involvement in co-curricular activities;  
vii. academic advising load;  
viii. applicable contractual obligations UNCG has made to faculty members;  

3. It is also understood that department heads, with the approval of their dean, have the right to adjust the duties and teaching loads of their Non-Tenured, Tenure-Track faculty, subject to the provisions of Section IV.C.2, so that these faculty members are not unnecessarily hindered in their attainment of tenure.  

4. Additional course reductions are also permitted when funded by buyouts using external funds, or when an individual has been granted a Research Assignment or other assignment of special responsibilities by a dean or the provost.  

5. Any modifications to a faculty member’s teaching load that deviates from the workload policy effective in his or her unit or department, where such policies exist, must be reported to, and approved by the dean.  

6. The dean is responsible for maintaining overall equity of total workload among Tenured and Tenure-Track faculty in his or her unit.  

D. Workload Assignments for Non-Tenure-Track Faculty  

1. Department heads/chairs, in consultation with the affected faculty member and under the supervision of their dean, make individual assignments and adjustments to assignments that are based upon the expectation of following considerations:  
   a. Unit and departmental workload policies, where these exist;
b. The understanding that the teaching workloads of Academic Professional track faculty and Clinical Faculty will vary based on the faculty member’s specific position description, as determined by the unit and/or department.

c. The standard teaching workload for other (non-Academic Professional or Clinical) full-time, non-tenure-track faculty is 24 semester hours (eight organized courses, or their equivalent, per academic year, 6 hours of which are assigned to research/creative activity, for all tenured/tenure-track faculty.)\[1 \text{ per year} \] This teaching workload may vary in certain cases, for reasons similar to those given in section IV.C.2.d.

The standard teaching load\[\text{dean is responsible for full-time lecturers is 24 semester hours per year (12 hours per semester). This teaching load may vary in certain cases.}\]

d. Standard teaching loads for Academic Professional maintaining overall equity of total workload among different types of non-tenure-track faculty will vary, and are determined by the unit or department, depending on their specific position descriptions between these faculty and Tenured/Tenure-Track faculty.

E. Assignment of faculty workload (including teaching workload)

a. Faculty members will receive their assigned annual workload in writing, using the Faculty Workload Assignment Form (which may be modified to meet unit or department- or unit-specific needs).

b. A record of a faculty member's assigned workload is to be included as part of the documentation for annual reviews, as well as for reappointment, promotion, tenure, and post-tenure reviews.

F. Modifications\[\text{Relationship to other UNCG policies}\]

a. The UNCG Annual and Approval Post-Tenure Review Policy for Faculty establishes annual and five-year cycles of Workload Assignments performance review for faculty. Nothing in these Faculty Workload Guidelines shall be construed as establishing additional review cycles.

Modifications to a faculty member’s assigned hours for teaching may be made on the basis of considerations listed in the item above (“Workload Assignments”), and also in consideration of alternative assignments beyond those routinely expected of all faculty members in the department. Alternative assignments may include academic administration, unique service commitments, or other special assignments. Such assignments will be reviewed and agreed to by the department head and dean.

Service on Department, College/School and University-wide/Faculty Senate Committees is not an alternative assignment but is expected as part of the normal responsibilities of a faculty member.
Hours assigned for teaching may increase or decrease in consideration of the type of courses taught and/or number of student credit hours generated. Adjustments to a workload assignment may be necessary depending on course enrollments and/or program needs.

b. **Monitoring and** UNCG’s *University-Wide Evaluation Guidelines for Promotion and Tenure* establish acceptable activities for Tenure-Track faculty in the areas of teaching, scholarship and service. Nothing in these *Faculty Workload Guidelines* shall be construed to invalidate any of these categories of work, or to diminish the importance of any type of scholarship, teaching or service, including, but not restricted to, community-engaged scholarship.

c. Independent studies must conform to the UNCG *Guidelines on Independent Studies*, which is attached here by reference. These guidelines comply with Section IV.A of UNC Policy 700.6.1[R], *Academic Integrity Regulations*.

V. **Course Overloads**

1. **An overload is coursework taught by a full-time faculty member that exceeds the course load expectations expressed below:**
   a. 18 semester hour (six organized courses, or their equivalent) per year for Tenured or Tenure-Track faculty members;
   b. the teaching expectations set in their contracts for Academic Professional and Clinical faculty members;
   c. 24 semester hours (eight organized courses, or their equivalent) per year for other (not Academic Professional or Clinical) Non-Tenure-Track faculty members.

2. All overload assignments must conform to the UNC System *Supplemental Pay Policy for Employees Exempt from the State Personnel Act* (UNC Policy 300.2.13), the *UNCG Policy on Compensation Beyond Contract for Faculty and EPA Nonfaculty Employees*, and the *Guidelines for Implementation of the UNCG Policy on Compensation Beyond Contract for Faculty and EPA Nonfaculty Employees*.

VI. **Monitoring of Teaching Workload**

1. Department heads and academic deans are responsible for monitoring faculty teaching workloads for the faculty under their supervision.

2. Each semester, within two weeks of the fall and spring semester censuses, the Office of Institutional Research (OIR) will provide an *Instructional Analysis Report* to each department head on the teaching workload for all faculty members in their department.

---

8 In rare cases a Tenured/Tenure-Track faculty member, whose only duty is teaching, may teach 24 semester hours (eight organized courses, or their equivalent) per academic year and not be considered to be teaching an overload.
The report will consist of two main sections. Section 1 will include a summary faculty headcount and FTEs, numbers of organized sections, student credit hours generated per organized section, student credit hours generated per individualized instruction, and faculty performance metrics. Section 2 will include a detailed listing of departmental faculty members and the courses they teach. Department heads will review the reports and provide any necessary corrections details for correction in Banner Student or Banner HR. Updated reports will be generated and OIR will send the corrected Instructional Analysis Reports to the academic deans for final review.

3. Once a year, during spring semester, department heads will review Section 2 of the Instructional Analysis Report for their department and add a brief justification for each instructor whose teaching workload falls below 15 semester hours (five organized courses) or their equivalent, per year. These annotated reports will be submitted to OIR with the department’s corrected data (Section VI.2, above). After receiving the corrected reports for their unit, each dean will prepare a written summary of teaching workload of the faculty in their unit and submit this summary to the Provost’s Office.

VII. Reporting of Faculty Teaching Workload

The UNC Office of the President requires that each UNC institution participate in the University of Delaware's National Study of Instructional Costs and Productivity—(Delaware Study). The Delaware Study provides comparable teaching data at the discipline level using the following faculty categories: regular tenure stream, other regular, supplemental, and teaching assistants (UNC Policy 400.3.4). These data are used to compare departmental instructional productivity among institutions within a of the UNC campuses. Please refer to UNC Policy 400.3.4 for more information. Comparisons with national peer group norms as developed by the Delaware Study are presented for further context. The Board of Governors and President expect that, in comparisons of like departments at peer institutions, UNC campuses will demonstrate acceptable levels of productivity relative to ratios for student credit-hour generation and teaching costs per faculty member. UNCG reports its study the final fall semester data resulting from the Instructional Analysis Review, described above, to UNC General Administration on an annual basis and regularly evaluates its trends in instructional productivity to assure that it is able to demonstrate these acceptable levels. Please refer to UNC 400.3.4[R] Regulations Related to Monitoring Faculty Teaching Workloads (Because the Delaware Study is a measure of fall semester instructional productivity only, the teaching workload presented in this Study will generally represent only one-half to three-fifths of the academic year teaching workload.) Please refer to UNC 400.3.4[R] Regulations Related to Monitoring Faculty Teaching Workloads for more information.

VIII. Evaluation and Reward of Teaching

UNCG’s Annual and Post-Tenure Review Policy for Faculty provides guidance on the purpose and process of annual evaluation of faculty performance intended to promote faculty vitality. Annual reviews apply to all faculty members, whether tenured, tenure track, non-tenure track Tenured, Tenure-Track, Non-Tenure-Track, paid or unpaid (including lecturers, clinical faculty, academic professional faculty, Lecturers, Clinical Faculty, Academic Professional Faculty, or other “special

The purposes of Annual and Post-Tenure reviews, as outlined in UNC 400.3.3 and 400.3.3.1[G], are to:

- Sustain and facilitate excellence among tenured and tenure-track faculty by recognizing, encouraging, and rewarding faculty performance;
- Foster faculty development by evaluating all aspects of professional performance, by acknowledging progress in specific areas, and by identifying specific activities that can be undertaken if improvement is needed.

The evaluation and reward of teaching take place in the context of an overall evaluation of a faculty member’s entire professional performance.

IX. Periodic Review of Policy

Changes to these Faculty Workload Guidelines will be submitted to the Faculty Senate for comment before being approved by the Chancellor and submitted to General Administration for approval by the President.

X. Related Policies and Regulations

UNCG Promotion, Tenure, Academic Freedom and Due Process Regulations

UNCG Annual and Post—Tenure Review Policy for Faculty
http://provost.uncg.edu/documents/personnel/posttenurereview.pdf

UNC Policy 300.2.1 — Employees Exempt from the State Personnel Act
http://www.northcarolina.edu/apps/policy/index.php?pg=vs&id=269&added=1

UNC Policy 400.3.3 – Performance Review of Tenured Faculty
http://www.northcarolina.edu/policy/index.php?tag=400.3.3

UNC Policy 400.3.3.1[G] – Guidelines on Performance Review of Tenured Faculty
http://www.northcarolina.edu/policy/index.php?tag=400.3.3.1%5BG%5D

UNC Policy 400.3.4 – Monitoring Faculty Teaching Workloads
http://www.northcarolina.edu/policy/index.php?tag=400.3.4

UNC Policy 400.3.4[R] - Regulations Related to Monitoring Faculty Teaching Workloads

UNC Policy 400.3.5.1[G] - Guidelines on Training, Monitoring, and Evaluating Graduate Teaching Assistants

UNCG Faculty Workload Policies Page
http://provost.uncg.edu/publications/personnel/workloads.asp

UNCG Guidelines on Independent Studies

UNCG Policy on Compensation Beyond Contract for Faculty and EPA Nonfaculty Employees

UNCG Guidelines for Implementation of the UNCG Policy on Compensation Beyond Contract for Faculty and EPA Nonfaculty Employees
https://web.uncg.edu/hrs/Class_Comp/compensation_guidelines.pdf

Faculty Workload Assignment Form
http://provost.uncg.edu/documents/personnel/Assignment_Form.doc

Policy Administrator
Office of the Provost