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ARTICLE [x]. WORKLOAD AND OVERLOAD COMPENSATION

Section 1. Definition of Full-Time Faculty Workload

The primary responsibilities of all faculty members are teaching, professional development, and service. Teaching encompasses lectures and labs as well as activities such as working with students outside of class, posting and maintaining appropri

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48 Section 2. Workload Minima for Non Tenure Track Faculty, Tenure-Track
49 and Tenured Faculty

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51 Workload ~~minima~~ ranges are guarantees to both a faculty member and a department. While
52 departments may differ in how much their faculty spend on different aspects of workload, all faculty
53 across the university will share the workload ~~minima~~ ranges, according to their type of appointment.
54 Bargaining unit faculty with heavy instructional workloads shall be guaranteed time for service and
55 professional development, which are necessary for tenure and promotion; ~~similarly, faculty with~~
56 ~~heavy non-instructional workloads shall be guaranteed to spend the majority of their time on~~
~~instruction, in keeping with the character of Oregon Tech as a teaching institution.~~

141
142 10 hours of non-instructional work = 1 workload unit

143
144 Quantifying Service

145 For service duties whose work occurs primarily in meetings, workload shall be calculated based on
146 approximate meeting hours per year. For service duties whose work occurs primarily outside of
147 meetings, workload shall be calculated based on approximate hours of work per year. In either case,
148 WLU correspond to the non-instructional workload formula above, where 10 hours of non-
149 instructional work = 1 WLU.

150 Additionally, in recognition that chairing a committee creates additional workload, chairing a
151 committee shall count as an additional 0.1 WLU per meeting (that is, an extra hour of work for
152 every meeting).

153
154 To ensure institutional equity in workload assignments, major university-wide service shall be
155 divided into three categories: high-commitment service (> 20 hours per year), mid-commitment
156 service (10-20 hours per year), low-commitment service (< 10 hours per year).

157
158 In addition to major university-side service, other non-instructional duties as assigned by a
159 department and according to departmental needs shall be calculated according to the non-
160 instructional workload formula. Department chairs shall justify their classification of departmental
161 service workload in their annual workload reports. This list shall be revisited each June by
162 departments and OT-AAUP.

163
164 Student advising workload shall be capped at 50 advisees per faculty member and shall follow the
165 non-instructional workload formula, where 10 hours of work = 1 WLU. That formula shall be
166 applied specifically to advising in the following way.

167
168 < 10 students = not quantified
169 ~~11-20 students = 0.5 WLU/quarter~~
170 ~~21-30 students = 1.0 WLU/quarter~~
171 ~~31-40 students = 1.5 WLU/quarter~~
172 ~~41-50 students = 2.0 WLU/quarter~~
173 ~~2-154 students = 0.25 WLU~~ not quantified
174 155-29 students = 0.5 WLU/quarter
175 30-40 students = 1.0 WLU/quarter
176 41-50 students = 1.5 WLU/quarter
177 >50 students = 2.0 WLU/quarter

178
179 Service work in the form of program director shall receive a minimum of 3 WLU per term. Other
180 departmental service such as scheduling, program assessment, retention and recruitment
181 coordinator, shall receive commensurate recognition of work according to the workload formula in
182 this section.

183
184 Quantifying Professional Development.

185 In recognition of the disciplinary expertise of individual departments, professional development
186 shall be quantified at the departmental level in accordance with the non-instructional workload
187 formula. For example, a department may determine that presenting at a regional conference is worth
188 .5 WLUs while presenting at a national conference as worth 2 WLUs, etc. Such determinations shall

189 be justified in both the annual Faculty Objectives Plan and in the department's annual workload
190 reports.

191

192 **Section 5.6. Commitment to Maintaining Full FTE**

193 In the event of course cancellation for insufficient enrollment, the University will work with the affected
194 faculty member to determine if it is possible to replace the course assignment with an equivalent course
195 assignment within the same appointment period and academic year.

196 If it is not possible to replace the course assignment within the same ~~appointment period~~ and academic year,
197 the department may provide an equivalent, alternative non-instructional assignment consistent with the
198 department's workload ~~policy~~ [needs](#). Examples of such work include but are not limited to the following:
199 advising; determining course equivalencies for transfer credit; assessment projects; curriculum development;
200 recruiting. The equivalent, alternative assignment must be assigned and realistically completed during the
201 same term the cancelled course was scheduled.

202

203 **Section 6.7. Overload and Overload Compensation**

204 Any work—instructional or non-instructional—performed by faculty members beyond their 36
205 WLU full-time workload shall be considered overload. In recognition that overload work is work
206 outside of a faculty member's regular annual contract, performing instructional or non-instructional
207 work outside of 36 WLUs (i.e., workload of 37 WLUs or above) shall never be mandatory and shall
208 always be compensated. To maintain departmental flexibility with workload assignments, overload
209 shall be formally calculated at the end of spring term and paid on June 30th. The June 30th overload
210 will be added to the faculty salary calculation for retirement benefits.

211

212 Overload shall be compensated per WLU at 1.5 times the bargaining unit member's annual base
213 salary, as determined by the following workload overload formula:

214

215 $\text{Salary divided by total annual WLU} = \text{pay per workload unit (WLU)}$

216 e.g. 9-month salary divided by 36 = pay per workload unit (WLU)

217 12-month salary divided by 48 = pay per workload unit (WLU)

218

219 Example A:

220 9-month salary (\$54,000) divided by 36 = \$1500.00/WLU

221 $\$1500/\text{WLU} \times 1.5 = \$2250/\text{WLU}$ (overload pay per WLU)

222

223 Example A Overload Compensation:

224 $6 \text{ WLU} \times \$2250/\text{WLU} = \13500

225

226 Example B:

227 9-month salary \$72000/36 WLU = \$2000/WLU

228 $\$2000 \text{ WLU} \times 1.5 = \$3000/\text{WLU}$ (overload pay per WLU)

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230 Example B Overload Compensation:

231 $6 \text{ WLU} \times \$3000/\text{WLU} = \18000

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233 No faculty member shall be forced to take on overload work; overload must always be voluntary.

234 Overload shall be distributed in such ways that faculty shall have equal opportunities to fulfill

235 responsibilities needed for tenure and/or promotion, and instructional and non-instructional

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236 workload should not disadvantage faculty members' promotion and/or tenure process (e.g., faculty
237 who are deficient in non-instructional criteria should not be encouraged to overload in instructional
238 workload, etc.).

239
240 Externship overload shall be calculated according to the following formula: \$60 per student-basis
241 per credit hour.

242
243 Hybrid or online courses shall be loaded equivalently to face-to-face/traditionally delivered courses.
244 All other loading procedures in this Article shall apply.

245 246 **Section 7 8. Determination of Course Caps**

247 Course caps (maximum number of students) shall be determined in consultation with departmental
248 faculty, and these caps shall be based primarily on established disciplinary and pedagogical best
249 practices. Course caps shall be clearly communicated to bargaining unit members at least at the time
250 of course scheduling or earlier, whenever possible.

251
252 A course can only be over-enrolled with the explicit voluntary consent of the faculty, in exceptional
253 circumstances, and compensated at pro-rated workload units (for example, a course loaded as a 3
254 WLU with an established cap of 20 students, shall be loaded as a 6 WLU course if a faculty agrees to
255 teach the course with 40 students in it).

256 257 **Section 8. Student Consultation Hours**

258
259 (A). All bargaining unit members shall be available for student consultation. Student consultation
260 sessions, student contacts and communication are a necessary part of teaching a course. Full-time
261 bargaining unit members shall establish and maintain a minimum of five (5) scheduled or by
262 appointment student consultation hours per week outside of class, each term they are teaching.
263 Those bargaining unit members with less than full-time appointments shall establish minimum
264 consultation hours in proportion to their part-time appointment.

265
266 (B). Each bargaining unit member shall include consultation hours on each course syllabus. Upon
267 request bargaining unit members shall report consultation hours to administrative supervisor

268 **For the Article on Definitions:**

269 **Academic Year.** Academic year shall consist of three (3) 10 week terms. For nine (9) -month
270 faculty the academic year shall consist of three (3) 10 week terms beginning on or about September
271 15th including a Convocation before the beginning of the fall classes but not including scheduled
272 holidays, Thanksgiving Break, Winter Break and Spring Break, as defined by the current academic
calendar.