

**UNIVERSITY OF TEXAS MEDICAL BRANCH
SCHOOL OF NURSING**

Guidelines for Faculty Workload

Guideline	Example
1) Consistent with the mission of UTMB, teaching, scholarship and service are the components which comprise faculty workload. The faculty workload formula presented is based on the traditional 40 hour work week. Teaching Load Credit, or TLC, is the unit used for the teaching component.	Teaching + Scholarship + Service = 100% Workload
2) It is useful to conceptualize a week (5 days) as 100%, therefore, one day is roughly equivalent to 20% time.	20% = 1 day
3) Of this 100%, the following School of Nursing allocation applies to all faculty unless otherwise negotiated: 20% scholarship, 5% service and 5% student advising, 70% teaching. Faculty Assembly Chair and chairs of the 4 major SON committees receive an additional 5% release time from teaching.	Teaching (70%) + Scholarship (20%) + Service (10%) = 100% workload (without additional source funded or negotiated time)
4) Teaching allocation is based on guidelines from the Rules and Regulations of the UT Board of Regents (see Appendix A) which defines a minimum workload equivalent to eighteen (18) semester hours of instruction each nine-month academic year; 24 TLC for 12 month appointment.	Teaching (70%) = 24 TLC/year (12 mo appointment) Fall – 9 TLC Spring – 9 TLC Summer – 6 TLC
5) Calculation of faculty workload occurs for the academic year and the percent effort devoted to each of the three components is negotiated with the Program Director annually. An additional 20% service or scholarship (1 day/wk) time funded by practice or a grant would result in a 20% reduction in teaching load.	Teaching (50%) + Scholarship (20%) + Service (30%) = 100% 70% teaching = 24 TLC/year; 24 TLC x .2 = 4.8; 24 TLC – 4.8 = 19.2 TLC/yr 50% teaching (9 TLC x .2 = 1.8 TLC; 9 TLC – 1.8 TLC = 7.2 TLC/semester fall and spring; summer: 6 TLC x .2 = 1.2; 6 TLC – 1.2 TLC = 4.8 TLC summer)

<p><u>Sample workload Undergraduate Faculty:</u> Teaching: 65% = 8.5 TLC (9 x .05 = .45; 9 - .5 = 8.5) Scholarship: 20% Service: 15% (Chair FA)</p> <p><u>Sample workload Graduate Faculty:</u> Teaching: 45% = 6.75 TLC (9 x .25 = 2.25; 9 - 2.25 = 6.75) Scholarship: 40% (20% grant funded salary support) Service: 15% (Chair AAPT)</p>	<p><u>Calculation:</u> NURS 3511 (2.5:2.5) CC = 2.5 + .5 CC + 1 (8 clinical groups) + 1.1 (60 students) = 5.1 TLC NURS 3440 = 3 + .5 online = 3.5 = 8.6 TLC total</p> <p>GNRS 5080 1 clinical group (preceptors) = 4 cr x .6 = 2.4 TLC GNRS 5567 (2:3) CC (2 cr x 1.5 (grad course) = 3 = 3 TLC = 5.4 TLC total</p>
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Assumptions which underpin this workload formula can be found in Appendix B.

THE WORKLOAD FORMULA

1. UG Didactic Course	1 course credit = 1 TLC
Graduate Didactic Course	1 course credit = 1.5 TLC
Seminar (Graduate and UG)	1 course credit = 1TLC
2. <u>Clinical Labs</u>	
<u>Undergraduate Labs</u>	
	2 course credits=3.3 TLC
UG lab in an agency	2 .5 course credits = 4 TLC
	3 course credits = 5 TLC
(7.5 hrs/wk divided by 1.5TLC)	5 course credits = 8 TLC
UG supervision of precepted students (15)	1 course credit = 0.5 TLC
<u>Undergraduate and Graduate Labs</u>	
UG and Graduate On-Site Lab (Sim. lab)	1.5 course credits = 1 TLC
	3 course credits = 2 TLC
UG and Graduate on-line Supervision of Clinical Placements (25) students	1 course credit = 0.5 TLC
<u>Graduate Labs:</u>	
Direct supervision (1:1)	3 course credits = 3 TLC
Supervision of Preceptor placements (1:6)	3 course credits = 2 TLC
As per Assumption #11 (1:3)	3 course credits = 1TLC
(1:1)	3 course credits = 0.5 TLC
3. Dissertation Guidance (Chair only)	3 course credits = 1TLC
4. Practicum and Independent Study	
UG 1/10 TLC per each semester hour	10 course credits = 1 TLC
Grad 1/5 TLC per each semester hour	5 course credits = 1 TLC

Additional Considerations

5. New Faculty: Up to 3 TLC's may be given for two semesters to a new faculty member in the first year of employment for the purposes of developing instructional materials.
6. Course Planning: It is conceivable that there are cases determined by the Program Director when extensive course planning is required before course implementation. In

these cases, the current formula allows 5% of 9 credits or .45 TLC's. This is calculated in this formula as .5 TLC's and allocation is determined by the Program Director.

7. Course Coordination – The course coordinator will receive extra workload credit for 6 sections or more in a course. Each 6 sections is worth 1 TLC with a maximum allocation of 3TLC's per semester. Although this is meant to include didactic sections, it is interpreted in this formula to include the coordination of multiple clinical groups or sites necessary for clinical implementation.
 8. Large classes (see below) that require “extensive grading or evaluation of student work by a faculty member may receive additional credit as follows:

50-59 = 1 credit	100-124 = 1.5	250 or more = 2.0
60-69 = 1.1 “	125-149 = 1.6	
70-79 = 1.2 “	150-174 = 1.7	
80-89 = 1.3 “	175-199 = 1.8	
90-99 = 1.4 “	200-249 = 1.9	

(Section 36.17 Bd. Of Regents)
- The large class designation is given in this formula to the course coordinator.
9. Sole Teacher receives full course TLC's and may receive large class size credit.
 10. Team faculty members receive an allocation of one-half the didactic course credit. Faculty team members have the expectation of participating in team meetings, lectures, exam preparation, exam monitoring and review.
 11. New program or new course development, including on-line course development with staff support, is allocated one (1) to three (3) TLC's at the discretion of the program director. This allocation is designated the semester prior to the course being taught.
 12. Guest lecturers accept this responsibility as a professional courtesy. It is expected that there is some reciprocation by the instructor of the course with the guest lecturer:-
 13. A second faculty member in a course ordinarily receives half the course credit to reflect lectures given or that percentage of the total credits that reflect his/her course contribution. The rationale for this is that the second person is a bona fide faculty member who should be participating in all aspects of course delivery and this is reflected through distribution of total course credit. It is a professional expectation that a “new” faculty member will take advantage of all opportunities to learn about the courses to which s/he is assigned.

Appendix A

Board of Regents Rules, Part One, Ch. III, Sec. 36

The University of Texas System

Rules and Regulations of the Board of Regents Series: 31006

Page 1 of 6

1. Title

Academic Workload Requirements

2. Rule and Regulation

Sec. 1 Statutory Requirement. State law requires the Board of Regents to adopt rules concerning faculty academic workloads.

Texas Education Code [Section 51.402](#) recognizes that important elements of workload include classroom teaching, basic and applied research, and professional development. Workload for the faculty members of the institutions of The University of Texas System is expressed in terms of classroom teaching, teaching equivalencies, and presidential credits for assigned activities.

Sec. 2 Minimum Workload. Each person paid full time from the appropriations item "Faculty Salaries" shall be assigned a minimum workload equivalent to 18 semester credit hours of instruction in organized undergraduate classes each nine-month academic year, or fiscal year at an institution's option, in accordance with guidelines listed below.

Sec. 3 Source of Funding. When a faculty member is paid partially from a source of funds other than the "Faculty Salaries" line item, the minimum workload shall be proportioned to the percentage of salary paid from the appropriations item "Faculty Salaries."

Sec. 4 Supervision of Teaching Assistants. Teaching assistants shall be used only when given proper guidance and supervision to ensure quality instruction. The minimum faculty workload established below does not apply to graduate teaching assistants or assistant instructors who are pursuing degrees. The institutional head is responsible for assuring that all teaching assistants are carefully supervised.

Sec. 5 Institutional Requirements. This policy sets the minimum workload and equivalencies only; an institution may enact more intensive and/or more detailed minimum requirements for inclusion in the institutional *Handbook of Operating Procedures*, following appropriate approvals. For example, an institution may set individual minimum requirements, consistent with these minimum guidelines, for a specific school or college.

The University of Texas System

Rules and Regulations of the Board of Regents Series: 31006

Page 2 of 6

Sec. 6 Equivalencies. The following equivalencies are available to meet workload requirements:

6.1 Graduate Instructions. One semester credit hour of graduate instruction will be considered the equivalent of one and one-half semester credit hours of undergraduate instruction.

6.2 Labs. One and one-half contact hours of instruction of regularly scheduled laboratory and clinical courses, physical activity courses, studio art, studio music instruction, and primary music performance organizations, such as ensembles and marching bands, for each week of a long-term semester will be considered the equivalent of one semester credit hour of undergraduate instruction.

6.3 Supervision. Supervision of student teachers, clinical supervision, and intern supervision shall be credited such that 12 total student semester credit hours taught will be considered the equivalent of one semester credit hour.

6.4 Honors Program or Individual Research Projects. Supervision of student practicum and individual instruction courses, such as honors programs and individual research projects, shall provide equivalency at the rate of one-tenth semester credit hour for each student semester hour of undergraduate instruction and one-fifth semester hour for each student semester hour of graduate instruction per long-term semester. In no case will individual instruction in a single course generate more semester credit hour equivalence than if the course were taught as a regularly scheduled, organized course.

6.5 Thesis or Dissertation Supervision. Graduate thesis or dissertation supervision shall provide equivalent credit hours only to the chairperson of the thesis or dissertation committee at the rate of one semester credit hour for each six total student semester hours of thesis research credit and at the rate of one semester credit hour for each three total student semester hours of dissertation credit.

6.6 Coordination of Courses. A faculty member who coordinates several sections of a single course shall be

**The University of Texas System
Rules and Regulations of the Board of Regents Series: 31006**

Page 3 of 6

given one semester hour of workload credit for each six sections coordinated up to a maximum of three semester hours of credit per semester.

6.7 Large Classes. Workload credit may be proportionally increased for teaching a large class that requires extensive grading or evaluation of students' work by the faculty member according to the following weighing factors:

Weighing

Class Size Factor

59 or less 1.0

60 - 69 1.1

70 - 79 1.2

80 - 89 1.3

90 - 99 1.4

100 - 124 1.5

125 - 149 1.6

150 - 174 1.7

175 - 199 1.8

200 - 249 1.9

250 or more 2.0

6.8 Proportional Credit. When more than one teacher participates in the instruction of a single course, the credit is proportioned according to the effort expended.

6.9 Insufficient Enrollment. A reduced workload may be granted temporarily if assigned classes do not materialize because of insufficient enrollment and when additional classes or other academic duties cannot be assigned to the faculty member. This exception may be granted for two consecutive long-term semesters only for any particular faculty member.

6.10 Administrative Services. Workload credit may be granted for a faculty member who is head of a department or head of a comparable administrative unit up to a maximum of six semester hours of workload credit per semester. When justified by the department/unit head and approved by the institutional head, three hours of credit may be given to faculty members who provide nonteaching academic services to the department/unit head.

In no case will the total for departmental administration,

The University of Texas System

Rules and Regulations of the Board of Regents Series: 31006

Page 4 of 6

including the head, exceed nine workload credits per semester unless the institution's organizational structure includes academic units composed of more than one academic discipline.

6.11 New Faculty Members. At the recommendation of the head of the department or comparable unit and upon

approval of the institutional head, up to three semester hours of workload credit for each of two semesters may be given to a newly-appointed faculty member during the first year of employment for the purpose of developing instructional materials for the courses he or she will teach.

6.12 Course Development. At the recommendation of the departmental chair and upon approval of the institutional head, workload credit may be granted to a faculty member involved in the creation of a new course, new course format, or new course materials.

6.13 Credit Granted by Institution Head. Academic workload credit granted by the head of the institution for all other purposes is limited to 1% of the total semester credit hours taught at the institution during the comparable (fall or spring) semester in the previous year. With the approval of the institutional head, limited faculty workload credit (within the 1% limit above) may be granted for major academic advising responsibilities, for basic and applied research following a research work plan approved pursuant to institutional policy, for preparing major documents in the fulfillment of programmatic needs or accreditation requirements, or for duties performed in the best interest of the institution's instructional programs as determined by the head of the institution.

6.14 Clock-hour Basis. Instructional workload equivalents for faculty members holding technical rank may be determined on a clock-hour basis where full-time employment is equivalent to not less than 30 hours of instructionally related activities each week for contact hour courses taught on a quarterly basis.

Sec. 7 Monitoring of Workloads. The president of an institution shall designate the officer of the institution who will monitor workloads, review workload reports, and submit the reports to

The University of Texas System

Rules and Regulations of the Board of Regents Series: 31006

Page 5 of 6

the institutional head for approval and comment, as appropriate, prior to submitting the reports to the Board of Regents through the System Administration following the standard reporting format and deadlines as provided by the Texas Higher Education Coordinating Board in accordance with *Texas Education Code Section 51.402* and any applicable riders in the current *General Appropriations Act*.

Sec. 8 Compliance Assessment. Every faculty member's compliance with these minimum academic workload requirements shall be

assessed each academic year. If a faculty member is found to be out of compliance, the institution shall take appropriate steps to address the noncompliance and to prevent such noncompliance in the future.

3. Definitions

None

4. Relevant Federal and State Statutes

Texas Education Code [Section 51.402](#) – Report of Institutional and Academic Duties

5. Relevant System Policies, Procedures, and Forms

None

6. Who Should Know

Administrators

Faculty

7. System Administration Office(s) Responsible for Rule

Office of Academic Affairs

Office of Health Affairs

8. Dates Approved or Amended

December 10, 2004

The University of Texas System

Rules and Regulations of the Board of Regents Series: 31006

Page 6 of 6

9. Contact Information

Questions or comments regarding this rule should be directed to:

- bor@utsystem.edu

Appendix B

Assumptions

1. Faculty role obligations include: teaching, scholarly production, and service.
2. Scholarship is interpreted in a broad manner as per Boyer's recommendations in Scholarship Reconsidered.(1990) Boyer used the paradigms of discovery, integration, application, and teaching to define scholarly activity. For example, innovative teaching strategies would be considered examples of scholarship as would practice which contributes to the body of specialized nursing knowledge.
3. Academic rank is not given any differential preference in workload, i.e. Professorial rank does not merit, in itself, workload considerations different from those of the Associate Professor, Assistant Professor, or Instructor. Differences in workload calculations may occur because of research and grant activities and these are usually evidenced by more

senior faculty members, e.g. Professors and Associate Professors. Therefore, instructors may appear to have higher teaching loads because they have not yet produced the type of scholarly activities that demand time commitments. All time commitments for research and grants must be approved by the Program Director, the Associate Dean for Academic Affairs and Administration, and the Dean. This procedure allows for the careful assessment of the needs of the School in relation to faculty release time and ensures that these activities will be accounted for in the workload computation.

4. This formula is designed for those faculty members without administrative obligations.
5. Tenure track and non-tenure track faculty are considered in the same way for workload calculation.
6. Faculty paid in part through other funding streams related to research or service grants will have funded time allocations computed into the formula. For example, a faculty member paid by a grant for a 30% effort would have a teaching reduction of 2.7TLC's ($.30 \times 9cr = 2.7 \text{ TLC}$)
7. Source-funded positions are considered within the same context as joint appointments. That is, a percentage of a faculty member's time has been "sold" to other entities at UTMB. This percentage of time is deducted from that person's teaching allocation of 70%. For example, if a faculty member is contracted to work as a nurse practitioner in a UTMB clinic for 20%, that person's teaching time would now be 50%, i.e. there would be a 20% reduction in TLC's expected each semester the arrangement is in place. $20\% \text{ of the expected } 9 \text{ TLC} = \text{a reduction of } 1.8 \text{ TLC's}$ for a teaching load expectation of 7.2 TLC's each of the fall and spring semesters and a reduction of 1.2 TLC's for summer for an expectation of 4.8 TLC's in the summer with an annual expectation of 19.2 TLC's per year. Faculty practice that is not source-funded may receive a teaching load reduction comparable to source funded positions.
8. On-line courses will receive the same credit allocation as in-class, face-to-face classes and will receive an additional allocation of 5% or .45 TLC's (or .5 TLC's) to reflect the additional time demands. This allocation is supported by a variety of publications addressing the additional time requirements associated with on-line teaching. It is acknowledged that new course development, whether or not the course is on-line, does take more time and this is provided for in the formula.
9. Clinical labs receive the same 50 minute designation as didactic courses. This means that a 3 cr. Lab = 7.5 hours per week rather than 9 hours per week. ($50 \text{ minutes} \times 9 \text{ hours} = 450 \text{ minutes}$ divided by $60 = 7.5$)

hours). This is important not only for credit allocation for clinical experience but also for the number of clinical hours reported to the Board of Nursing.

10. In graduate programs, clinical hour calculations are usually required for certification rather than credit allocation. E.g. $7.5\text{hrs/wk}/14\text{ weeks} = 3\text{ credits}$; a total of 105 hours. A 3 credit graduate clinical course would be reported as 105 hours unless, because of hours needed for accreditation, the 60 minute hour is used, in which case a 3 credit course would be credited as $9\text{ hrs/wk}/14\text{ weeks} = 3\text{ credits}$ for a total of 126 hours.
11. Accreditation requirements for most practitioner programs require a 1:6 clinical ratio. It is assumed that one instructor would make two (2) visits per student (6 students) per semester for a total of 12 visits per semester. It is possible that at least one (1) student might require a third visit; thus this would mean that the faculty member makes one visit per week for 13 weeks. Time equivalency is difficult to generalize because of the distance involved in many placements; therefore, visits could range from 3 hrs/week to 8 hrs/week. An average could be approximately $6\text{ hrs/wk} \times 13\text{ wks} = 78\text{ hrs/semester}$. This is equivalent in the formula to 2 TLC's ($6\text{hrs} = 2/3 \times 9$; $2/3 \times 3\text{ credits} = 2\text{TLC}$). It is recognized that visits to sites beyond a 50 mile radius may require some adjustment in the workload formula.
12. Directors of Centers of Excellence receive 20% (the equivalent of one day per week) for activities related to the centers. Accountability for this time will be required. A Center Director would have 50% time available for teaching. This translates to a reduction of 1.8 TLC's or an expected workload of 7.2 TLC's.
13. The Chair of the Faculty Assembly and the chairs of the four major SON committees (Curriculum, AAPT, APR, and MEC) will receive a 5% allocation release from teaching ($.05 \times 9 = 0.45\text{TLC} = .5\text{ TLC}$) in recognition of the additional work required in these positions.

Appendix C

Background

Faculty members of the SON at UTMB are to be commended for their efforts to develop a faculty workload formula that attempts to meet the needs of the School and seeks to represent a fair and equitable teaching load. Suggestions made in the proposed workload document have been developed to acknowledge that developmental work. The faculty workload formula presented is based on the traditional 40 hour work week. It is further acknowledged that many studies on faculty workload have shown that the average faculty

member actually works 60-80 hours per week. It is beyond the scope of this document to consider this fact in computations. It is covertly considered in Teaching Load Credit (TLC) because, for each credit of didactic teaching, it is commonly accepted that there are 3 hours of preparation per course credit for a new course and 2 hours of preparation per course credit for a course previously taught. This means that a 3 credit course involves 9 hours plus 1 hour for evaluation, a total of 10 hours per week or roughly the equivalent of one day (20%).

While it is useful to conceptualize a week (5) days as 100%, it is difficult to allocate faculty teaching responsibilities by percentage. Since the Regents' Rules address faculty teaching responsibilities as credits, a percentage equivalency to TLC's has been developed. The use of credits is also commonly used throughout the country.

As per the faculty workload document of 9/2/03, the equivalent of one day a week is allocated (20%) for professional/scholarly development. The Dean has granted this "protected" time, with the caveat of accountability, to all faculty with the exception of faculty members who might be hired by grants or other time-limited efforts where the functions of that person are directly related to those funded activities. Those individuals would not receive the allocated 20% protected time. **Protected time should be blocked out on faculty calendars and used for writing for publication, grant preparation, clinical scholarship, and/or other similar activities.** AACN described the components of the scholarship of practice as including development of clinical knowledge, professional development, application of technical or research skills, and service. Sigma Theta Tau International (STTI) defined clinical scholarship as an approach enabling evidence-based nursing and the development of best practices to meet the needs of clients efficiently and effectively. (STTI, 1999) In the event that a faculty member does not use this protected time for scholarly activity as described, this time may be reallocated to teaching time. Reallocation of this time could occur at the faculty member's request, i.e. an acknowledgement that that person does not want to engage in the scholarly pursuits indicated and would prefer to teach. The reallocation of that 20% time would ordinarily occur at the annual faculty evaluation, i.e. if the faculty member cannot produce evidence of scholarly productivity. This means that faculty members are held accountable to use the professional/scholarly/protected time in the manner for which it is designated.

In the same workload document developed by the faculty, a 15% allocation of time (3/4 a day) was allocated for service, 6 hrs/weekx15 weeks or 90 hours/semester. The proposed plan allocates 5% for committee service, or the equivalent of 2 hrs/week/15 weeks or 30 hrs/semester or 90 hrs/year. The persons serving as chairs of Faculty Assembly and the four major committees of the Assembly would each receive an additional 5% to reflect the work required. Service activities may be broadly interpreted to include committee membership both for the SON and the university, participation in community activities including serving on hospital committees, other agency committees, initiating and participating in community benefit activities, etc. Participation on dissertation committees or service as an outside reader for a dissertation is considered service to either the UTMB community or to the profession. Dissertation committee

membership will not be accounted for separately in the workload although chairing dissertation committees is a component.

This workload formula incorporates a new designation of 5% (1/4 of a day) for academic advisement. This allocation of time is recognized because of the recent emphasis on a faculty advisement for each student. Advisement would be recognized as 2 hrs./week/15 weeks or 30 hrs./semester. These allocations leave the equivalent of 70% time/ week for teaching. Since the Board of Regents has a 9 credit per semester minimum requirement for teaching each semester, 70%=9 credits per fall and spring semesters and is equal to 6 TLC's for the summer session, i.e. 70%= 100% teaching time.

The expected teaching load for tenure track faculty per the Board of Regents is a minimum of 18 TLC's/9 months (2 semesters) or per fiscal year at the discretion of the university. Health Science Centers have traditionally been able to establish the workloads that are deemed reasonable and acceptable. It is suggested that UTMB SON accept the 18 TLC's for the Fall and Spring semesters and, since this School has a three semester program, that the Summer semester expectation be 6 TLC's for an annual maximum teaching assignment of 24 TLC's/year. This allows for variations from semester to semester with the expectation that over 12 months, each faculty member will accrue the equivalent of 24 TLC's. For those faculty members on 9 month appointments, they would accrue 18 TLC's as mandated by the Board of Regents. Teaching required in excess of the minimum designation will be implemented where such teaching is "necessary to meet the institutions' obligations to students." (Board of Regents) [The goal is for faculty to receive their teaching assignments (and workload allocation) in early Spring for the upcoming academic year. However, it is recognized that unforeseen or extenuating circumstances may necessitate an occasional change in teaching assignments. In these circumstances faculty will be given as much advanced notification as possible.]

References: Board of Regents Rules, Part One, Ch. III, Sec. 36

THECB Workload Report Form

UTMB-SON Faculty Workload Document, Rev. 9/2/03

American Association of Colleges of Nursing. (1999). *Defining Scholarship for the discipline of nursing..* Washington: Author.

Sigma Theta Tau International. (1999). *Clinical scholarship white paper.* Indianapolis: Author.

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