

# FACULTY OF HEALTH PROFESSIONS' WORKLOAD DISCUSSION DOCUMENT

Last Updated January 2017

## Preamble

Workloads in the Faculty of Health Professions are considered heavy but there is also concern that they are inequitable across units, and sometimes within units. Reductions in numbers of faculty members over the years, and reductions in budget, have added to the teaching workloads of faculty members as well as increased administrative work for all members of academic units.

In a response to a University initiative to assess workloads across Faculties, a workload study was conducted based on Faculty of Health Professions workloads from July 1, 1992 to June 30, 1993. This study required meticulous reconstruction of the work that faculty members did and utilized the annual workload signed by both the Director and Faculty member, faculty member annual reports, enrolment and timetable information from the Registrar's office, consultation with the calendar for course descriptions, and use of payroll information on teaching assistants and other instructional support. The study was presented to the Directors in January 1998.

The main findings were:

1. Workload reporting varies from unit to unit.
2. Some units do not report other than teaching-related workload.
3. Workload does not equal 100% in several units.
4. Several workloads are based on self-report of activities, e.g., contact hours, which are not derived from standardized assessments.
5. There may be inequity in teaching workloads across the Faculty.
6. It is difficult to determine in a meaningful way the number of courses taught by a faculty member because of insufficient information, e.g., faculty member taught versus coordinated the course, member taught whole or part, amount of assistance, etc.
7. Electives taught by full-time faculty members vary from few to many.
8. Units do have a clear idea of how workload is derived, however, documentation is not as clear.
9. Committee work is often treated generously in workloads and is often undifferentiated.
10. Units that consider more than teaching workload commonly use the five workload components identified in the Collective Agreement. Often there is an "other" category.
11. Special circumstances, e.g., fieldwork students, are often treated generously.
12. No School/College workload is so unique that it could not be recorded in a standardized fashion.

As a response, Directors agreed to develop a standardized workload reporting system, and to explore the development of a consistent process for a fair and just workload assignment and reward process. The **purpose** of this document, therefore, is to develop a standardized workload system that is principled-based, fair, comparable, equitable, and allocates research workload ultimately on the basis of research productivity. The exploration for the development of a consistent process began with the establishment of a series of workload principles:

### **Workload Principles**

By **workload** is meant the full range of academic responsibilities, including all teaching-related activities, research and scholarly work, library, extension and administrative work, all service-related activities (clinical, committee, professional, public) and all relevant criteria and standards applicable to probation, promotion and tenure. (See also articles 20, 21 and 22 in the Collective Agreement).

**Normal working hours/week** means the hours required to fulfill all weekly workload responsibilities, i.e., the duties assigned and reported on the standard workload reporting form.

### **1. General Considerations**

- **Workload responds to/meets units' missions/needs**

The needs of units are considered to be those efforts expended that are necessary to fulfill a stated mission, including core clinical and administrative functions and research.

Needs could be identified and defined by a unit's faculty and Director and approved by the Dean.

- **We aim for workload equity within the Faculty and within units**

Equity and Fairness involve the consistent application of workload assignments, workload principles and recognition of the value of the work performed within a framework of flexibility.

- **Workload includes recognized activities**

Recognized activities are those duties assigned and reported on the standard workload reporting form.

- **We would like to balance teaching and other workload components**
- **For larger units, workload assignment aspires to see that full-time faculty members cover the vast majority of courses at full complement**

Larger units are the College of Pharmacy, School of Social Work, School of Health & Human Performance, School of Nursing and School of Human Communication Disorders.

- **In workload, we try to get our fair share from joint/part-time appointments**

Contributions made by joint or part-time faculty, excluding sessionals, will include, as a minimum, teaching and administration.

## **2. How Workload is Determined**

- **Workload is multi-component**
- **Workload = 100% (i.e., major components are assigned %)**
- **Guidelines, rather than calculations, will inform differential workload consideration so that a quantitative formula is avoided since it promotes "gaming" the system and unproductive paper work**
- **Although workload generally reflects flexibility and adaptability within accepted annual agreements, workloads may be further adjusted when there are real exceptional needs that may arise under unusual circumstances as identified by the Director and approved by the Dean (see also Article 20.04 of the Collective Agreement).**
- **The Director has responsibility for the interpretation of the Faculty of Health Professions' guidelines and assignment of workload, and advises the Dean**
- **Workload is presented on a standard workload reporting form that indicates assigned duties in terms of research and scholarship, teaching, and service. At the beginning of each year and after workload has been established and signed off, unit members have the opportunity to view workload reporting forms within their unit. While workload reporting forms aim for fairness and transparency, they are different from and additional to the Collective Agreement Annual Reporting Form, whereby annual activities and accomplishments must be reported (Article 20.07)**

For example, such a document includes information on

- course number
- course specifics (whether shared teaching, class size, evaluation demands, availability of markers or assistants, etc.)
- guest teaching
- documented research time, but little detail on research, except to substantiate research workload
- service activities

### **3. Research Workload**

**Research workload is granted on a performance basis**

**Research** involves efforts to enhance scientific and societal understanding with demonstrated continuing activities whose results are disseminated through peer-reviewed activities. (See also article 17.17 – 17.19 of the Collective Agreement).

**Research Productivity** is the consistent input into conference presentations, consistent output of peer-reviewed activities, peer-reviewed publications, generation of external funding, professional reports based on research and research contracts.

**Research Potential**, as evidenced by interest, conceptualization, commitment and making progress, will also be considered (see also Collective Agreement, clauses 17.17 – 17.19).

**For example:**

- Demonstrated continuous research activity would mean 1½ peer-reviewed publications per year in journals or 1 peer-reviewed publication and one other contribution, such as a book chapter etc., averaged over a 3-year period. In the case of books, co-authors and number of pages will be considered.
- External funding received will be evidence of research productivity.
- Units will be charged with developing research productivity specifications suitable for their disciplines.

### **4. Teaching Workload**

**All workloads include teaching and teaching-related activities**

- This principle ensures that the teaching requirements of units are met.

- A satisfactory level of quality teaching includes fieldwork/clinical teaching, coordination, supervision and most other instruction given by faculty to students, including distance teaching. (See also article 17.11 – 17.16 of the Collective Agreement).
- Quality of teaching is evaluated through student and, possibly other methods of evaluation.
- Shared teaching will be apportioned according to relative involvement in the course.
- Workload consideration will be given for:
  - teaching courses for the first time
  - adopting innovative teaching strategies
  - development of distance education courses
  - large classes (see below), classes with special requirements, classes with abnormally high evaluation requirements or especially demanding thesis supervision
  - IPE teaching

- **There is a core teaching load within the Faculty**

- **Teaching versatility is reflected in workloads**

Teaching versatility means that some people are able to teach more subjects than others.

- **Clinical/field-work instruction is teaching and coordination can be considered as teaching or administrative service**
- **Grad courses are weighed similarly to undergraduate courses except that for undergraduate courses class size will also be considered in conjunction with the availability of teaching assistants, markers or both**
- **Below a minimum class size, faculty will not be granted a teaching credit except as Directed Reading and Directed Project courses and as per the Policy on Minimum Enrollment**
- **Each faculty member is required to fulfill a minimum number of student contact hours (office hours)**
- **Additional or reduced teaching will also be based in part on administrative and service duties, however this will typically only happen with specific buy out, unless the position is an established one within the School (e.g. Director)**

- **Funded research and other objective measures of research productivity may offset teaching responsibilities, however this will typically only happen with specific buy out.**
- **Once teaching workloads have been finalized for each academic year, they will be made available to all members within their academic unit on a standardized workload reporting form**

## **5. Administrative Workload**

- **All workloads include administration**

Administrative service includes service to the School/College, Faculty, and University, such as membership on committees, service to the Association, service to the profession, the wider community and to society. Clinical/Fieldwork coordination can be considered administrative or teaching service. (See also article 17.20 of the Collective Agreement).

- **There may be differential workload consideration for committee/administrative leadership versus participation**

## **6. Other Workload Considerations**

- **Professional**

**Professional contributions are assessed in workload and will be valued in the context of overall unit workloads**

Professional contributions include membership in a professional society, acting as reviewer of profession-related documents and providing instructional or other consultations to external agencies.

- **Scholarship**

**Competency-based practice will be assessed and valued in the context of overall unit workloads**

By competency-based practice we mean practical skills exhibited as, for example, in clinical teaching.

- **Educational pursuits, i.e., doctoral studies, may be assessed as part of workload but will be considered in the context of unit workloads so long as they do not increase other faculty members' teaching loads or otherwise interfere with the smooth functioning of units**

- **Professional development necessary to maintain competency in changing teaching environments, such as distance education and Internet proficiencies, will be considered within the workload context**
- **Professional development that is unit prioritized and involves special projects, such as New Ventures development, interprofessional partnering, may be assessed as part of workload within the context of unit workloads**
- **Extramural activities are assessed for compatibility with workload and performance in accordance with the Collective Agreement**

## **7. Workload Models**

MAC also considered three workload models reflecting employment conditions, performance, and career stages of faculty members. Because of the inherent diversity in the Faculty of Health Professions, units determine course equivalencies. Teaching-related activities, such as preparation, student contact, supervision of field students, advising, directed reading, interprofessional modules, internship coordination, thesis supervision, etc. will be bundled at the unit level to derive the teaching-related activities and course equivalencies.

### **A. Limited Term Workload:**

100% Limited Term appointments would have workloads exclusively related to teaching and administration. It is believed that the maximum teaching workload for any faculty member should be 4 full course-equivalents, i.e., 24 credits plus other teaching-related activities. They will also assume administrative duties of approximately 20-40% time. [In comparison, part-time faculty members are generally assigned 8% time per 3 credit hour courses during the teaching term.]

Because it is possible that some units have the concern that few persons may be fully qualified to provide the equivalent of four full courses in a diversity of subject areas in a quality manner, Directors, in conjunction with their faculty and with the approval of the Dean, may adjust the following model so that a higher percentage of administrative work can be incorporated.

### **Examples of Teaching/Administrative Contributions with No Research Workload**

60% Teaching = 3 course equivalents (18 credits for approximately 48% time plus 12% for other teaching-related activities)

40% Administrative Service

80% Teaching = 4 course equivalents (24 credits for approximately 64% time plus 16% for other teaching-related activities)

20% Administrative Service

B. Untenured Workload (PTT, TT):

Untenured faculty members would be given the opportunity to demonstrate that they can meet the criteria for tenure in the domains of teaching, research and administration. They are offered protected research time in order to develop an independent research program during their pre-tenure years so that sufficient time is available to permit tenure criteria to be met. Professional activities would be assigned within administration.

40% Teaching = 2 course-equivalents (12 credits equivalent to 32% time plus other teaching-related activities for an additional 8%)

40% Research

20% Administrative Service

C. Tenured Faculty Workload:

Tenured faculty members would be assigned workload according to their performance and agreed upon workload principles. Research workload, in particular, should be earned on the basis of productivity.

The minimum teaching workload in the Faculty should be one course-equivalent (6 credits). On rare occasions and under exceptional circumstances it may be possible to receive a reduced teaching load of  $\frac{1}{2}$  course-equivalent (3 credits). This would require a buy out for the faculty member.

For instructor stream faculty members who are not assigned research workload, career progression through the ranks should be recognized on the basis of performance in the teaching and administrative areas.

Other faculty members would increase their administrative contribution or increase their teaching contribution towards that of the limited term appointment. For example, those who have an 80% teaching workload will have many teaching-related activities (supervision, advising, thesis supervision, directed reading, interprofessional module activities, internship coordination).



Clinical/ fieldwork instruction with students is teaching, whereas Fieldwork coordination can be considered towards administrative or teaching service.

## 8. **Definitions**

**Administrative service** includes service to the School/College, Faculty, and University, such as membership on committees, service to the Association, service to the profession, the wider community and society. (See also article 17.20 of the Collective Agreement).

**Competency-based practice** means practical skills exhibited as, for example, in clinical teaching.

**Fair share** means that contributions made by joint or part-time faculty, excluding sessionals, will include, as a minimum, teaching and administration.

**Normal working hours/week** means the hours required to fulfill all weekly workload responsibilities.

**Professional service** includes membership in a professional society, acting as reviewer of profession-related documents and providing instructional or other consultations to external agencies.

**Recognized activities are** those duties assigned and reported on the standard workload reporting form.

**Research** involves efforts to enhance scientific and societal understanding with demonstrated continuing activities whose results are disseminated through peer-reviewed activities. (See also article 17.17 – 17.19 of the Collective Agreement).

**Research Productivity** is the consistent input into conference presentations, consistent output of peer-reviewed activities, peer-reviewed publications, generation of external funding, professional reports based on research and research contracts. Research potential, as evidenced by interest, conceptualization, commitment and making progress, will also be considered when judging research productivity.

**Scholarship** involves individual effort to maintain currency in one's discipline and profession. (See also article 17.17 – 17.19 of the Collective Agreement).

**Teaching** includes fieldwork/clinical teaching, coordination, supervision and most other instruction given by faculty to students, including distance teaching. (See also article 17.11 – 17.16 of the Collective Agreement).

**Units' needs** are considered to be those efforts expended that are necessary to fulfill a stated mission, including core clinical and administrative functions and research. Needs are identified and defined by a unit's faculty and Director in the context of the Faculty and University's missions.

**Workload equity and fairness** involve the consistent application of workload assignments, workload principles, and recognition of the value of the work performed within a framework of flexibility.

**Workload** means the full range of academic responsibilities, including all teaching-related activities, research and scholarly work, library, extension and administrative work, all service-related activities (clinical, committee, professional, public) and all relevant criteria and standards applicable to probation, promotion and tenure. (See also articles 20, 21 and 22 in the Collective Agreement).

#### **8. Sample Workload Reporting Form**

The Workload Reporting Form can be found on the FHP website.

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