

Faculty of Education
Criteria and Processes for Making Off-Load Appointments
Version March 16, 2011

Background

The Faculty of Education *Framework for Workload Negotiations and Decisions* (see FoE website on Policies and Procedures) is designed to help in creating a balance for faculty in the time expended across three core areas: teaching and supervision, scholarly activity and service. Guidelines and criteria are provided to create equitable workload profiles that allow for some flexibility, but set parameters for workload allocations.

Within the Framework are expectations related to Teaching: “It is expected that all full-time tenure-track and tenured Assistant Professors, Associate Professors and Professors will teach at least twelve credits of coursework annually on the assumption that they are also engaged in a significant amount of service and scholarly activities as well as student supervision.” Also signaled are some of the reasons that might justify a deviation from this general expectation. One is for new tenure-track Assistant Professors, who are to be given a reduction in teaching responsibilities over their first two years. Another is for faculty who are not as active in the other core activities: “Faculty should increase instructional responsibilities pending reduced activities in other areas such as service, graduate student supervision and scholarly activity.”

Rationale

The workload framework clearly suggests that additional teaching assignments made to faculty who are less active in other core activities should be made as part of their expected workload requirements (i.e., not as “off-load” appointments). That said, there are occasions when faculty productive in all three areas might be asked to teach above typical expectations. These off-load appointments should only be made in very specific circumstances.

There are many problems associated with making “off-load” appointments to faculty, including:

1. individuals’ time is finite. Adding responsibilities to teaching necessarily takes time away from individuals’ ability to create a balanced portfolio that also creates sufficient time for supervision, scholarly activity, and service;
2. working off-load threatens sustainability in peoples’ work lives, loading on responsibilities beyond what should be expected in relation to teaching;
3. off-load appointments, if they become the “rule,” signal a systemic problem: we’re not constructing the work of our units in ways that are sustainable and work within human resources we have available;
4. when off-load appointments are made to new, tenure-track assistant professors with reduced appointments, we are undermining their ability to build a research profile (which is the purpose of their teaching reduction); and

5. When off-load appointments become common, we are in danger of creating a second, behind-the-scenes “economy,” paying faculty piecemeal for academic work, rather than taking a holistic view of how to construct and balance workload across time (within the work terms and salaries associated with faculty positions).

Criteria

1. Off-load appointments should only be made in exceptional circumstances. When off-load appointments become routine in any given area, then a systemic review is needed to identify what changes can be made to ensure expertise is available to support programs and workload levels remain sustainable.
2. Off-load appointments might be considered if the need is time limited or arises due to an unexpected or unavoidable circumstance, for example:
 - a. An unexpected situation arises (e.g., a new section is suddenly needed; another instructor becomes unavailable to teach a section);
 - b. That individual is the only one with expertise at this moment, although there are plans to ensure expertise necessary in the longer-term will be available to support our range of programs (so it’s an exceptional, short-term solution to an immediate problem);
 - c. There is a developmental reason for an individual to teach off-load in a particular circumstance, with clear plans on how to structure instruction in the future.
3. As is articulated in the Faculty’s workload Framework, additional teaching requirements above 12 credits assigned to individuals who are not productive across all three core areas (as judged through a unit’s processes) should be considered as part of their workload, not as off-load appointments.

Process

1. Permission for any off-load appointments needs to be obtained from the Dean’s Office (through the Senior Associate Dean) in advance of the appointment being made.
2. In support of any such appointments, the Head of the faculty member’s department must support the appointment in writing, and must provide an explanation of how that appointment is in line with the rationale and criteria presented in this document.
3. It should be made explicit in documentation that the unit Head *and* faculty member recognize that approval of the appointment would constitute a “one-time” exception, and would not establish a precedent for on-going off-load appointments as a workload allocation or program support strategy.