The FoE Faculty Workload Policy was developed with reference to Article 13, Notification of Workload, of the Part 1 of the *Collective Agreement between UBC and the UBC Faculty Association* dated July 1, 2019 – June 30, 2022. The purpose of this Policy is to articulate and provide equity, transparency, and consistency of workload planning in each of the Departments/Schools/Programs in the Faculty of Education, to support the work of the Heads/Directors, and to provide clarification of relevant practises and expectations. This document replaces the *Faculty Framework for Workload Negotiations and Decisions* (April 2007).
1. Workload Planning

a. The academic workload of a faculty member is a combination of self-directed and assigned tasks undertaken in fulfillment of their academic responsibilities in all areas appropriate to the type of their appointment (Lecturer, Educational Leadership or Professorate stream).

b. Annual workload assignments should follow the governing principles outlined in Part 1 of the Collective Agreement, Article 13.02, and should be consistent with the expectations for the faculty member’s appointment/rank and the operating obligations of the unit, the Faculty and the University.

c. Heads/Directors are ultimately responsible for ensuring a fair distribution of work within the unit while the Dean is responsible for ensuring a fair distribution of work across the Faculty.

d. Reasons for variations from “normal” expectations in workloads and opportunities generally available to modify workloads must be clearly communicated to all faculty members.

e. There may be some variability in each type of activity as a percentage of overall workload. For example, certain types of research chairs/professorships come with an expectation that a larger proportion of time be devoted to research and supervision. Normally, a faculty member should not have more than 2-course (6-credit) teaching release (regardless of its sources) in any given year but may carry forward such teaching release to future years, with the Head/Director’s prior approval.

f. Some faculty members may, for a variety of reasons, have lower research activity in a given period and can be accommodated with a higher teaching or service load to ensure equitable distribution of work among members of the unit.

g. When lower than expected activity or performance in one area (for example, in scholarly activity, educational leadership, graduate student supervision, or service) suggests the need to increase activity in another area (for example, teaching), a reasonable period of notice should be given so that adequate preparations can be made.

h. Overall allocation of workload is expected to be equitable even though there may be variations in distribution among the areas of activity. This includes making reasonable efforts to ensure that all faculty members have opportunities to include in their workloads the kinds of activities that are expected as members progress in their careers.

i. Each Department/School should communicate the unit’s general approach to workload (within the scope of all other relevant policies) to the unit members annually. “Final” workload profiles for all faculty within a unit should be accessible to other faculty within that unit.

j. The Faculty of Education’s workload year is from May 1 to April 30.
## 2. Typical Faculty Workload Distribution

<table>
<thead>
<tr>
<th>Appointment Type</th>
<th>Workload Distribution</th>
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<tbody>
<tr>
<td><strong>Professoriate Stream Faculty</strong></td>
<td>Teaching</td>
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<tr>
<td>40%</td>
<td>40%</td>
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<tr>
<td>12 Credits/Year</td>
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<tr>
<td><strong>Educational Leadership Stream Faculty</strong></td>
<td>Teaching &amp; Educational Leadership*</td>
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<tr>
<td>80%</td>
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<tr>
<td>24 Credits*/Year</td>
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<tr>
<td><strong>Lecturer</strong></td>
<td>Teaching, Teaching Related Duties, and Service</td>
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<tr>
<td></td>
<td>30 Credits/Year</td>
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</table>

* Significant Educational Leadership activities that account for credits in one’s regular workload require the Head/Director’s prior approval.

## 3. Variations in Faculty Workload

In addition to variations based on the type of appointment held, there are other reasons why workloads may vary among individuals with the same type of appointment and how workloads may be adjusted.

a. *Teaching release through grant-related funds*
A faculty member holding a research grant or contract may have funds available to “secure” a release from teaching in order to devote proportionally more time to research or educational leadership, provided that a grant-funded teaching release is a permissible expense for the grant. The maximum teaching release that a faculty member can use (regardless of its source) in any given year is two courses (6 credits).

All teaching release needs to be pre-approved by the Head/Director. Normally, requests for grant-funded teaching release in a grant budget should be approved prior to the submission of the grant proposal, to support the Department/School’s instructional planning. Depending on the unit’s instructional needs, the Head/Director may request (or approve) carrying forward a teaching buyout through grant-related funds to the next year.

At the present time, the buyout rate in the Faculty of Education is $10,000 per 3-credit course.

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1 Faculty members are strongly encouraged to seek advice from the Director, HR, and the Office of Research in Education when applying for grants to find out the grant’s eligibility for teaching buyout.
2 The Faculty’s buyout rate is subject to change.
b. **Research chairs and professorships**
Research chairs and professorships may include some teaching release as part of the appointment. These teaching release FTE will be specified in the appointment letter and generally continue as long as the chair or professorship is held and performance has been deemed satisfactory in Annual Reviews carried out by ORE.

c. **Administrative Buyouts**
Key administrative and service roles involve teaching release assigned by the Dean. Teaching Release is proportional to a full load (rather than a fixed number of FTE) in the interest of workload equity for Educational Leadership faculty. In addition, proportional release is intended for Educational Leadership faculty to carry out key leadership projects as an integral element of “administration as leadership”. Where no such Educational Leadership projects are available or appropriate, course release will be reduced.

Course Release is as follows:

<table>
<thead>
<tr>
<th>Role</th>
<th>Course Release</th>
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</thead>
<tbody>
<tr>
<td>Department Head/School Director</td>
<td>100% teaching release</td>
</tr>
<tr>
<td>Associate Deans</td>
<td>100% teaching release (or proportional depending on the scale of the AD appointment)</td>
</tr>
<tr>
<td>Deputy Heads/Associate Director</td>
<td>Proportional teaching release, scaled to size of the Unit and available Leadership projects</td>
</tr>
<tr>
<td>Graduate Advisor</td>
<td>Proportional teaching release, scaled to size of the Unit and available Leadership projects</td>
</tr>
<tr>
<td>Program Director (MET/ECED)</td>
<td>50% teaching release</td>
</tr>
<tr>
<td>Director of Graduate Studies</td>
<td>50% teaching release</td>
</tr>
<tr>
<td>Administrative Secondments</td>
<td>Based on the seconded FTE</td>
</tr>
<tr>
<td>(Provost’s Office, G+PS, etc.)</td>
<td></td>
</tr>
<tr>
<td>Other major service roles</td>
<td>Determined case-by-case and available Leadership projects</td>
</tr>
</tbody>
</table>

d. **New appointment teaching release**
New tenure stream faculty members in the Professoriate Stream and in the Educational Leadership Stream are normally provided with teaching release in the initial years of a new appointment.
- Professoriate Stream faculty are provided 6-credit/2-course teaching release across the first two years of appointment.
- Educational Leadership Stream faculty are provided 12-credit/4-course teaching release across the first four years of appointment.

New Faculty Course Release is provided that faculty can devote proportionally more time to establish their research program or develop their Educational Leadership program at UBC. New faculty, regardless of stream, cannot normally make use of more than two course release in any given year.

All usage of course release in any given year requires review and approval of the Head/Director. New Faculty Course Release are included in the initial offer letter so the
Head/Director is aware of the commitments. The faculty member should consult their Head/Director on the timing of their teaching release and seek their approval so that the Head/Director can best meet the Unit’s teaching needs, which vary by year.

e. **Joint appointments**
   Some faculty members hold joint appointments in two or more units. Typically, their workloads are split proportionally between the units. This requires coordination between the Heads/Directors of both units. In such cases, it is very important that the proportional assignments and workload expectations be made clear in writing to all parties involved.

f. **Study leaves/Professional Development Leaves**
   Those granted Study Leaves or Professional Development Leave will not be assigned any teaching or service duties during the period of the leave. See Appendix 1 for guidelines on workload planning that involves such leaves.

g. **Medical leaves**
   These can be part-time or full-time. The work expected during a medical leave will be adjusted according to the extent of the leave and the capacity of the member to perform the work as supported by the medical documentation.

h. **Maternity, parental and adoption leaves**
   These are unpaid leaves during which no university duties are expected.

i. **Other leaves of absence**
   There are several kinds of leaves available to faculty members depending on the type of appointment. Workload planning during a Leave of Absence must take into account the nature of the leave and the work expectations – if any – during the period of the leave.

j. **Reduced appointments**
   If a member is approved a reduced appointment by the University, the make-up of their workload (as well as salary) will be adjusted on a pro-rated basis. The types of arrangements for reduced appointments range from full workload for part of the year in combination with no assigned duties in the balance, to a partial workload for all or part of the year. A reduced appointment cannot fall below 50% of full-time.

k. **Retirement options**
   Faculty members who elect to participate in one of the Retirement Options may have a workload that deviates from the “normal” distribution. Such retirement workload modifications should be discussed with, and require approval by, both the Head/Director and the Dean. Retirement-related workload modifications options are clearly outlined in the Collective Agreement and on the Retirement Option Election Form.

l. **Variations due to rank and tenure status**
   Those who have been promoted and hold tenure may be expected to assume different types of service and leadership roles than early-career and untenured members. Heads/Directors should keep in mind the need to provide equitable opportunities for all
members to engage in the kinds of activities that are expected on a CV if they are to advance through the ranks and to qualify for merit awards.

m. Other accommodations
Variations to workload can also be made to accommodate personal circumstances, health and other conditions - temporary or ongoing - of faculty members. These accommodations are most often arranged directly with the Head/Director, in consultation with the Dean.

4. Adjusting Workloads during the Year

a. Faculty members who wish to change their workload because of special circumstances need to negotiate the request with their Head/Director for review and approval.

b. If a course that is included in a faculty member’s workload is cancelled (due to low enrolment, for instance), the Head/Director and the faculty member will discuss how that part of the load will be reconfigured. Other duties could be substituted in that year or that part of the load could be carried forward into the following year resulting in a higher than “normal” teaching load.

c. Decisions of such workload changes should be confirmed in writing and properly documented for future reference.

5. Overload Assignments

a. Any overload assignments (teaching, research, educational leadership or administrative duties that exceed the expected load of a faculty member) that will result in honorarium payments must be approved in advance by the Head/Director and the Dean (or their designate).

b. Such approvals, as well as the rationale provided by the Head/Director, must be documented in writing, with a copy to the Director of HR, in the Dean’s Office for records.

c. Before approving overload assignments, Heads/Directors should ensure that the work involved is consistent with the unit’s operational needs and strategic priorities, and will not interfere with other responsibilities – or the career progression – of the faculty member or with the teaching requirements of the Unit. Such approvals cannot then entail an increase to the Unit’s Sessional teaching budget.

d. The Head/Director may request/approve having an overload assignment carried forward to the faculty member’s workload next year, in which case, no honorarium payment is required.
e. The current overload rate is $5,500 per 3-credit course (which may be pro-rated for work that entails a different number of credits).

f. Faculty members who are on a leave cannot be assigned work and receive an overload payment for such work.

g. Overload payments are processed as One-Time Payments in Workday after the overload assignments are completed. Pre-approvals from both the Head/Director and the Dean must be uploaded to the Workday BP when the payments are processed.

h. Honorarium payments are taxable (including income tax, CPP, EI and WCB) but do not attract pension or benefits. Please refer to the Faculty of Education Policy on Honorarium Payments to Full-time Faculty Members.

6. Categories of Work and Responsibilities

a. Teaching and teaching-related activities

Teaching face-to-face or online credit courses, coordination of multi-section courses, involvement in major curriculum projects, and student supervision are all considered under the general category of “teaching” for the purposes of Merit and Promotion/Tenure. Student supervision and advisement is an important aspect of teaching. Responsibilities for student supervision should be distributed as equitably as possible given the varying experience and expertise of faculty and the preferences of students. Departments/Schools and programs are encouraged to consider cohort-based and other alternative forms of supervision that are effective for students and efficient for programs.

Guidelines for the determination of credit weighting assigned to the coordination of multi-section courses of the Teacher Education Program are provided in Appendix 2 (under revision).

In accordance with University guidelines, faculty should be available to students for advisement or the faculty member should make arrangements with colleagues to ensure that student support can be ongoing when the faculty member is absent.

The quality of teaching is an important aspect of the reappointment, promotion, tenure and merit systems at UBC. Expectations related to the quality of teaching and how it is assessed are articulated in the Collective Agreement and should be communicated to all members of the Unit.

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3 The overload rate is subject to change.
b. Scholarly activity (for Professoriate Stream faculty members)

Scholar Activity is articulated in the Collective Agreement. Generally speaking, faculty members whose responsibilities include scholarly activities should prioritize scholarly publications, presenting their scholarship at scholarly conferences, and maintaining a basic level of external funding to support their research and graduate students. Expectations will vary across disciplines and specializations and should be clarified as much as possible within each unit and in relation to the Collective Agreement. Although general guidelines like the expected number of publications, amount and sources of research funding, number and quality of venue of research presentations have limited utility in communicating expectations, units are encouraged to provide as much clarity as possible about what constitutes acceptable and meritorious scholarly activity.

Faculty members whose scholarly activity has fallen below a minimum level (defined within the Collective Agreement and then, articulated within the unit) will be assigned additional teaching or administrative duties with an overall workload comparable to the reduction in Scholarly Activity.

c. Educational leadership (for Educational Leadership Stream faculty members)

Educational leadership is defined in the Collective Agreement and generally understood to refer to a program of initiatives designed to advance innovation in teaching and learning with impact beyond one’s classroom. Educational Leadership includes (but is not limited to):

- Application of and/or active engagement in the scholarship of teaching and learning;
- Significant contributions to curriculum development, curriculum renewal, course design, new assessment models, pedagogical innovation and other initiatives that extend beyond the member’s classroom and advance the University’s ability to excel in its teaching and learning mandates;
- Professional development and mentorship of colleagues;
- Formal educational leadership responsibilities that lead to clearly articulated contributions, such as Program or Curriculum Development or innovation within Department/School/Program/Faculty;
- Organization of and contributions to conferences, programs, symposia, workshops and other educational events on teaching and learning locally, nationally and internationally;
- Contributions to the Scholarship of Teaching and Learning, including publications such as textbooks, print and electronic publications, book chapters, articles in peer-reviewed and professional journals, conference proceedings, software, training guidelines, instructional manuals or other resources; and
- Other activities that support evidence-based educational excellence, leadership and impact within and beyond the University.

Significant Educational Leadership activities that account for credits in one’s regular workload require the Head/Director’s prior approval.
d. Service

Faculty members are expected by the University to make their professional knowledge and skills available to the Department/School and University, local communities, province, and national as well as global audiences and organizations. In addition, as professionals committed to governance by peers, there are many internal activities that must be performed to maintain the operations of the institution. Thus, service to the community as well as to academic and professional organizations is an important component of the faculty member’s obligation.

Service to the University and community includes a wide range of activities including serving on and chairing Departmental, Faculty- and University-wide committees. In principle, all faculty members should rotate serving on various committees, providing coordination within programs, and serving in other leadership roles.

Service to the Faculty and University also includes administrative appointments. When such appointments require significant amounts of time, the Dean will be responsible for distributing administrative buy-out allocations. Service to the community can include activities that are directly related to the education profession beyond the University.

7. Consulting

Providing expert advice to private sector, non-governmental, community or government clients enhances our Faculty’s reputation and is an example of outside activities that “add value” to the Faculty beyond traditional teaching, research and service.

These activities “add value” if they promote the mission of the Faculty and enhance teaching and research. This work outside the University needs to be balanced with the responsibilities of the individual to the University and Faculty.

Policy SC3: Conflict of Interest and Conflict of Commitment 4 specifies a maximum amount of such work that any individual may undertake within a given year, and faculty members must declare annually the time they have spent on such activities.

All faculty members are expected to be aware of UBC Policy SC3 on Conflict of Interest and Conflict of Commitment and to complete an annual declaration.

Appendix 1:

Guidelines for Workload Planning that Incorporates Study/PD Leaves

Study leaves often span over workload years (May – April), the following provides guidance on determining teaching loads prior to and following study leaves.

For **Professoriate Stream** faculty:
- For a 12-month study leave, the faculty member is expected to carry a 12-credit load within two workload years.
- For an 8-month study leave, the faculty member is expected to carry a 15-credit load within two workload years.
- For a 6-month study leave, the faculty member is expected to carry an 18-credit load within two workload years.

For **Educational Leadership Stream** faculty:
- For a 12-month study leave, the faculty member is expected to carry a 24-credit load within two workload years.
- For an 8-month study leave, the faculty member is expected to carry a 30-credit load within two workload years.
- For a 6-month study leave, the faculty member is expected to carry a 36-credit load within two workload years.

The shaded areas in the chart below indicate the permitted start dates and length of leave options available under the Collective Agreement. The un-shaded areas represent the terms during which teaching can be scheduled to fulfill workload obligations prior to and following the leave as outlined above. Specific teaching assignments and the terms during which they are scheduled are determined by the Head/Director, subject to instructional needs of the unit. Note that faculty are not permitted to teach during the period of a study leave.

<table>
<thead>
<tr>
<th>Length of Leave (in months)</th>
<th>May 1- June 30 (Yr 1)</th>
<th>July 1- Aug 31 (Yr 1)</th>
<th>Sept 1- Dec 31 (Yr 1)</th>
<th>Jan 1- April 30 (Yr 1)</th>
<th>May 1 - June 30 (Yr 2)</th>
<th>July 1- Aug 31 (Yr 2)</th>
<th>Sept 1- Dec 31 (Yr 2)</th>
<th>Jan 1- April 30 (Yr 2)</th>
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For **Lecturers** who are approved a 4-month Professional Development (PD) leave, they are expected to carry a 20-credit load for the year when the PD leave is taken.
Appendix 2 (under revision):

Guidelines for Credit Weighting for Coordination of Multi-Section Courses

In an attempt to standardize the teaching loads of those who accept responsibility for coordinating BEd multi-section courses, the following guidelines are offered:

- Specific teaching assignments and coordination responsibilities are determined by the Head
- The weighting assigned may vary and will depend on the work to be undertaken (# of sections and # of students), the experience of the faculty member, the composition of the team of instructors teaching the various sections, including the extent to which mentoring is required (e.g., tenure-track faculty, sessionals, experienced instructors, new instructors)
- The goal in having some coordination available is to achieve a reasonable degree of consistency in course delivery across the course sections
- The TEO is willing and able to advise, as needed, to determine the nature of coordination responsibilities

As a touchstone, faculty members (including seconded adjuncts) who are asked to coordinate the cohorts in the elementary teacher education option are assigned 2 credits for coordination. They typically undertake:

- Overseeing two orientation sessions (June and September) or a retreat for cohort instructors
- Planning and hosting 2 to 3 meetings in a term
- Liaising with about 16 instructors involved in the delivery of the cohort’s courses
- Communicating with personnel in the school districts hosting the cohort
- Meetings with students, the Teacher Education Office, and instructors, as needed
- Preparing a report for the Director of Teacher Education, at end-of-term, about outcomes, successes, and challenges

Multi-section course coordinators may:

- Supervise Graduate Teaching Assistants
- Assist with hiring of sessionals
- Host a meeting at the beginning of the term with section instructors
- Communicate via email with section instructors
- Conduct peer evaluations of teaching, including the preparation of report

It is advised that 0- to 3- credits, including 0.5 increments, be assigned for multi-section course coordination. The weights may be assigned on an incremental basis. For example:

- In the first year of undertaking the coordination role, 2 credits could be assigned and in subsequent years, 0 or 1 credit is assigned, depending on the nature of the work (i.e., how many of the five activities noted above are undertaken)
- 1 credit could be assigned if there were a lot of TAs and the course has been delivered for many years and the coordination required is minimal.
• 2 credits could be assigned if all instructors are new sessionals or seconded adjuncts and there is an intention to provide substantial mentorship, otherwise 0 or 1 credit would be assigned
• 3 credits could be assigned if the faculty member is coordinating the department’s contribution to Teacher Education, in its entirety and is contributing to committee work and other activities including the five noted above
• The weighting might be further influenced by whether a GTA is assigned to the coordinator or other relevant factors should be considered, as appropriate