

## School of Mathematical and Statistical Sciences Bylaws

### POLICY 08: FACULTY WORKLOAD DISTRIBUTIONS

#### A. General Principles

1. *Purpose:* This policy implements variable workloads for the School of Mathematical and Statistical Sciences, within the framework of the UT System Regent Rules<sup>1</sup> and the UTRGV HOP<sup>2</sup>. We strive to achieve the intended outcomes of the UTRGV variable workload policy as follows:
  - a. To ensure fair and equitable treatment of faculty members, standard workloads are defined, and all faculty have the right to adopt standard workloads if they meet objective criteria. Tenure-track faculty are protected from increased service workload.
  - b. To enable chairs to optimize assignments of faculty to meet School goals, workloads with increased teaching or increased research are defined. Faculty reserve the right to navigate the standard workloads and the workloads with increased teaching on the basis of objective criteria, whereas the School Director reserves discretionary approval for faculty requests to transition to workloads with increased research expectation.
  - c. To maximize the long-term effectiveness of the School's instructional resources, the School Director reserves the discretion to temporarily increase a faculty member's service workload for clearly enumerated types of service assignments.
  - d. To facilitate effective shared governance, objective criteria, developed by the School faculty, are used by the School Director either as sufficient or as necessary conditions for deciding on faculty requests to navigate variable workload assignments.
  - e. To establish predetermined and transparent limits on administrative expenses, service workload is set to 10% or 20% only, with higher service workloads reserved only for very special circumstances.
2. *Importance of Faculty:* Faculty play a fundamental role in advancing The University of Texas Rio Grande Valley and in fostering student success. The quality and value of a university education are in large part defined by the faculty. The curricula the faculty design, the programs they offer, the learning environment they create, the instructional methods they employ, the research they conduct, the creative works they produce, the service they provide, and their professional engagement with students inside and outside of the classroom, including advising, are important components of the educational experience. As such, institutions of higher education supported by public funds have the responsibility to fully utilize their faculty members in ways that achieve the greatest possible educational benefit.

#### B. Standard Faculty Workloads

1. The standard workload for tenure-track faculty is 60% teaching, 30% research, and 10% service.
2. Only when requested by a tenure-track faculty member, and with the approval of the School Director and the Dean on an annual basis, this standard workload can be

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<sup>1</sup> See UT System's Regents' Rule 31006.

<sup>2</sup> See UTRGV HOP ADM 06-501

modified with a decrease in the teaching workload, down to a minimum of 40% teaching, and an equal increase in the research workload, while maintaining the service workload at 10%. The tenure-track faculty maintains the right to revert to the standard workload distribution in subsequent academic years, upon request, and such request shall be granted.

3. The standard workload for tenured faculty is 60% teaching, 20% research, 20% service.
4. Tenured faculty may request, and shall be granted upon request, a modified workload of 60% teaching, 30% research, 10% service, if the faculty member has satisfied the baseline workload requirements for 30% research, also accounting for any workload equivalencies towards satisfying the baseline 30% workload requirement.
5. The standard workload for 3-year Lecturers is 80% teaching, 0% research, 20% service.
6. The standard workload for 1-year Lecturers is 100% teaching, 0% research, 0% service.
7. These standard workloads may be further modified, as provided for by sections F and/or G of this bylaw, but will still be governed under the policies of section B for standard workloads.

#### **C. Baseline workloads and workload equivalencies**

1. A separate bylaw shall define:
  - a. The teaching equivalencies that can contribute towards satisfying the teaching workload.
  - b. Objective metric-based criteria for fulfilling a baseline research workload at the levels 10%, 20%, and 30%.
  - c. Equivalencies towards satisfying the assigned research workload, to be added on top of the baseline research workload achieved.
  - d. Objective metric-based criteria for fulfilling a baseline service workload at the levels 10% and 20%.
  - e. Equivalencies towards satisfying the assigned service workload, to be added on top of the baseline service workload achieved.
2. For tenure-track faculty, meeting annual workload expectations is not necessarily sufficient for meeting the minimum School Criteria for tenure and promotion.
3. For tenured faculty seeking promotion to Full Professor, meeting annual workload expectations is not necessarily sufficient for meeting the minimum School Criteria for promotion.
4. For tenured faculty, meeting annual workload expectations is not necessarily sufficient for meeting the School criteria for Post-Tenure Review.

#### **D. Workloads with increased teaching for tenured faculty**

1. Tenured faculty may transition to one of the following workloads, as provided for in the following policy:
  - a. 70% teaching, 10% research, 20% service
  - b. 70% teaching, 20% research, 10% service
  - c. 80% teaching, 10% research, 10% service
  - d. 80% teaching, 0% research, 20% service

2. These workloads may be further modified as provided for by sections F and/or G of this bylaw, but will still be governed under the policies of section D for workloads with increased teaching load.
3. Transition to workloads with increased teaching workload shall be initiated only when at least one of the following two conditions applies:
  - a. The tenured faculty member requests it in writing; or
  - b. The tenured faculty member has not satisfied the baseline workload requirements for at least a 20% research workload, accounting for any research equivalences, in which case he/she will be asked to transition to 10% research workload. The service workload may be set at 20% if the baseline workload requirements for a 20% service workload, accounting for any service equivalences, have been satisfied, otherwise it shall be set at 10%.
4. Requests for transition towards any of the allowed workloads with increased teaching workload and at least 10% research workload, in the direction of strictly increasing teaching workload percentage shall be approved, if requested by a tenured faculty.
5. A tenured faculty may transition to the 80% teaching, 0% research, 20% service workload, under extenuating circumstances (e.g. an action plan in response to an overall negative rating on Post Tenure review), if requested by the faculty member, and with the discretionary approval of the School Director and the Dean.
6. Requests to return to a standard faculty workload from a workload with increased teaching workload, or requests to navigate between workloads with increased teaching workload where the teaching workload remains constant or decreases by 10% or 20%, with corresponding adjustments of the research and/or service workload, shall be approved if the faculty member currently has satisfied the baseline workload requirements for research and service of the new requested workload assignment, also accounting for any workload equivalencies added towards satisfying the assigned workload.

**E. Workloads with increased research expectations**

1. Tenured faculty may transition to one of the following workloads as provided for in the following policy:
  - a. 50% teaching, 30% research, 20% service
  - b. 50% teaching, 40% research, 10% service
  - c. 40% teaching, 40% research, 20% service
  - d. 40% teaching, 50% research, 10% service
2. Workloads with less than 40% teaching shall be granted only in very exceptional circumstances
3. These workloads may be further modified as provided for by sections F and/or G of this bylaw, but will still be governed under the policies of section E for workloads with increased research expectations.
4. In order for a tenured faculty to be eligible to transition to or to maintain one of the above workloads, it is necessary but not sufficient that he/she currently has satisfied the baseline workload requirements for research and service, also accounting for any workload equivalencies added towards satisfying the assigned workload.

5. A request to be transitioned to one of the above workloads shall be initiated in writing by the tenured faculty member and addressed to the School Director. No tenured faculty can be transitioned to a workload with increased research expectations, unless a written request is initiated by the faculty member. Furthermore, tenured faculty maintain the right to transition back to a standard workload in the next academic year, upon request.
6. Tenured faculty shall transition to a one of the above workload assignments by the approval of the School Director and the Dean. Thereafter, the faculty member may apply to renew the workload distribution. The application will be approved on an annual basis at the discretion of the School Director and the Dean.

**F. Increased Service workload above 20%**

1. At the request of the faculty member, and by the approval of the School Director and Dean, a faculty member that is PI or co-PI of a funded or continuing external service grant, or is serving as the Chair of the School's Tenure and Promotion Committee, or chair of a Search Committee, or is serving as the Chair of the Full Professor Committee or has been assigned a service-related project of extraordinary importance may temporarily increase his/her service workload above 20% in increments of 5%.
2. When the service workload is increased above 20%, that will result in an equal decrease of the teaching workload.
3. The increased service workload requires approval of the School Director and Dean for each subsequent academic year.

**G. Administrative appointments**

1. Workload corresponding to administrative appointments shall be offset in part or in whole by reduction of the teaching workload.
2. When the reduction of teaching workload does not offset the entire administrative workload, then the remaining workload shall be offset by reduction in assigned research and/or service workload.

**H. Workload banking**

1. Excess workload achieved in teaching, that has not been compensated with remuneration, will be credited for the subsequent academic years up to a maximum of 10% accumulated workload and can be redeemed towards satisfying teaching workload during any subsequent academic year.
2. Redeeming banked workload towards satisfying the teaching workload during the next 5 subsequent academic years must be approved by the School Director and Dean.
3. It is the responsibility of the School Director to provide each faculty member a short workload banking memo noting the amount of workload banked or redeemed in each academic year.
4. A faculty request to redeem banked workload should include the workload banking memos corresponding to the last 5 academic years.