UNIT WORKLOAD PLAN GUIDELINES

Introduction
The specific requirements for Unit Workload Plans are described in the Workload Policy. These guidelines are provided to assist departments in the fulfillment of the requirements and in the creation of their Unit Workload Plans. A workload plan should provide role assignments that encourage and incentivize faculty performance. The university supports the university-wide development of workload plans to enhance workplace equity and productivity, thereby enhancing scholarship and learning on campus.

While recognizing that faculty Percentages of Effort (POE) necessarily differ across academic units, disciplines, and even individual contracts, the unit workload plans should allow faculty across campus to make different, but equally valuable, contributions based upon their interests and skills, and the needs of the department. The Workload Policy and these Guidelines are meant to create a common understanding of workload so that faculty who are fully engaged make contributions identified as important within their units and across the university.

Units are encouraged to consider productivity from a unit wide perspective. The faculty workload in a unit includes teaching, scholarship and service responsibilities. Department heads determine the courses that will be offered each semester, the number of sections and the faculty teaching assignments. The Unit Workload Plan will inform the department head in making assignments for each semester and in assessing productivity and accomplishment in scholarship and service for Annual Reviews. The Unit Workload Plan should be consistent with the Unit Role and Scope Document; however, the retention, tenure and promotion reviews are summative and consider the faculty member’s contribution over the review period under the criteria established by the university. The Unit Work Plan is not intended to guide retention, tenure and promotion decisions.

The activities described under teaching, scholarship and service in these guidelines are provided as examples and are not a comprehensive list. All activities identified in Unit Workload Plans should be consistent with the definitions in the MSU Faculty Handbook and the general expectations at comparable land-grant universities and among peer institutions.

1. Teaching
Faculty can meet the expectations of their teaching assignment in a variety of ways. For example, faculty that participate in graduate training and/or actively engage in mentoring students may have course-based, instructional expectations that differ from faculty that have limited expectations for graduate education or student mentoring (See Faculty Handbook Retention, Tenure & Promotion Review Definitions here).
Expectations associated with teaching shall be consistent with the expectations adopted by the University. The unique nature of teaching in certain university programs, such as Extension and the Library, may not perfectly align with the general guidelines set forth in this policy. Workload Plans for faculty in such programs will adapt the University Workload Policy as appropriate.

Each unit will establish standards reflective of the unique circumstances of the unit, variables in teaching such as enrollment size, undergraduate/graduate level, instruction, and address, where necessary, the relation between student credit and faculty effort. For example, faculty whose teaching expectations are met entirely through course-based instruction, the assignment of 40% of effort in teaching might average two course-based classes per semester (6 credits hours based on a 3-credit lecture course that meets for 150 minutes/week). However, it is recognized that each unit will need to describe the teaching activities that will be undertaken by faculty as teaching, the unique nature of the teaching required in each unit and the responsibilities of the department to provide classes necessary for our student’s advancement and graduation.

The Unit Workload Plan for teaching assignments should describe potential adjustments to course-based assignments. Criteria for adjustments will be stated in the Unit Workload Plan. The unit may consider the following activities as contributing to the teaching expectations of a faculty member:

- Involvement in graduate education.
- Supervision and/or teaching of students in laboratories, clinics, practica, internships, externships, field experience, workshops, seminars, studios, clinical and/or other similar educational settings.
- Supervision and/or teaching of students in undergraduate research, experiential learning, service learning projects, study abroad programs, honors courses (i.e. sections involving only honors students) and/or other engaged learning activities.
- Advising of undergraduate students.
- Course and curriculum development.
- Innovative teaching, which may include approaches to instruction where extra preparation time or a higher than normal rate of student contact hours is required.
- Participation in performance groups and/or collaborative creative exhibits, related to the faculty member’s field.
- Any other activity that is consistent with the definition of teaching in the MSU Faculty Handbook and the unit’s Role and Scope Document.

2. Scholarship
Scholarship is the original intellectual work of faculty that includes the discovery, application, and/or assimilation of new knowledge and the dissemination of that knowledge. This work includes conducting research projects; securing and administering grants and contracts; writing/editing books, articles, and other research-based materials representing one's original or collaborative research; developing new clinical practice models; presentations at scholarly
conferences. Scholarship also includes the generation of new knowledge in pedagogy and the dissemination and putting into practice of that knowledge. This work includes creation, development, implementation, study, and publishing of pedagogical innovations (including textbooks, peer reviewed articles and publications); documented studies of curricular and pedagogical issues; and pedagogically-oriented research; innovation in community engagement. See Faculty Handbook Retention, Tenure & Promotion Review Definitions here).

Scholarship can represent the generation of new creative products and experiences through composition, design, production, direction, performance, exhibition, synthesis, or discovery and the presentation of that experience. This work includes creating and presenting new works of art, film, theater, music, and architecture; public performance and exhibiting creative works. Scholarship can also be the creation of partnerships, programs, and plans through Extension, or other community-based research, that leverage the knowledge and resources of the university and the public/private sector to enhance learning, discovery, and engagement; educate and engage citizens; strengthen communities; address locally identified issues and problems; apply and disseminate knowledge; and contribute to the public good.

For example, for a 40% scholarship assignment, the Workload Plan would require that faculty have an active area of scholarship that results in the production of peer-reviewed or professionally-reviewed publications or creative exhibitions commensurate in quantity and quality with faculty in the discipline at peer universities with comparable time and effort allocated for scholarship.

3. Service
Service is the contribution of faculty knowledge and expertise to assist and engage individuals and/or organizations to meet goals and solve problems. Service activities generally fall into three categories: professional service, which includes contributions to, or holding office in, a professional society, serving on an editorial board, and reviewing manuscripts for professional journals; public service, which entails providing the faculty member’s professional expertise to, collaboration and engagement with, local, state, national, and global communities; and university service, which includes service to faculty governance, serving on university committees, advising student groups, and participation in other activities that contribute to the institution and its programs. See Faculty Handbook Retention, Tenure & Promotion Review Definitions here).

The workload policy requires that units define a level of service that is commensurate with the individual faculty member’s service assignment. Service shall represent active participation on committees that focus on issues or directives of the university. It can include assuming a leadership role on one or more committees or actively participating on one or more committees per year. Formal mentoring of junior faculty can represent service by senior faculty.

Service involving active participation in professional or governmental organizations at the local, state, regional, national, or international level should be included. This may include being an officer in an organization, and/or developing a conference program. It also includes providing
professional peer reviews, jurying creative work, serving on external review teams and speaking to local, regional, national, and professional agencies. Among other issues, departmental size is an important factor in determining participation on committees. Service loads generally will not exceed 20% unless there are unusual circumstances.

4. Changing Percentages of Effort
The procedure for changing a faculty member’s assigned percentage of effort must be consistent with university policies (see Section 4, Annual Review Policy). Specifically, tenure-track faculty will maintain the percentages of effort as assigned at hire until they achieve tenure, unless a change in effort is initiated by the faculty member and approved by the primary and intermediate unit administrator(s) and the provost. After the award of tenure, either the faculty member or the unit administrator can propose changes to the faculty member’s percentages of effort, but mutual agreement must be reached before the change can be made. The revised percentages of effort can be for a specified term or reflect a long-term change of focus for the faculty member and the unit.

5. Joint Appointments and Workload Plans
For faculty who hold joint appointments, their total workload should be commensurate with that of faculty on single appointments in corresponding disciplines. The Memorandum of Understanding governing the appointment should specify how responsibilities for assigning workload will be shared between the units’ heads/directors. If the units involved in the joint appointments establish Workload Plans that set different standards, the Memorandum of Understanding must clarify how those standards will be applied to that individual.