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SR-02-03-(49) 79 EC, Executive Committee Resolution

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**EXECUTIVE COMMITTEE
RESOLUTION**

SR-02-03-(49) 79 EC

WHEREAS, The Ad Hoc Committee on Faculty Workload at Marshall University was formed by the Faculty Senate and Graduate Council in Spring 2002, and charged by these faculty groups with a) reviewing current faculty workload policy and practices across the University, and b) based on this review, making recommendations concerning revisions of those policies and practices. After significant work on this project, the committee believes that the flexible workload policy described in the attached text is the most appropriate strategy for dealing with the complex work environment of Marshall University faculty members;

We, Resolved, That

March 2003

Proposal for a Flexible Workload Policy

Ad Hoc Committee on Faculty Workload
As established by the Faculty Senate

Alphabetical List of Committee Members

Marty Amerikaner, Graduate Council (Committee Chair)
Elaine Baker, Faculty Senate
Janet Dooley, Faculty Personnel Committee
Stephen Haas, Faculty Senate
Cal Kent, Dean, College of Business
Eldon Larsen, Chair of Graduate Council
Jim Sottile, President of Faculty Senate

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NOW THEREFORE BE IT KNOWN,

The Ad Hoc Committee on Faculty Workload as established by the Faculty Senate

The Ad Hoc Committee on Faculty Workload at Marshall University was formed by the Faculty Senate and Graduate Council in Spring 2002, and charged by these faculty groups with a) reviewing current faculty workload policy and practices across the University, and b) based on this review, making recommendations concerning revisions of those policies and practices. The committee members represent a wide range of units and constituencies, including faculty from varied colleges, representatives from key faculty governance structures (i.e. Faculty Senate, Graduate Council, the Personnel Committee) and faculty members from both the Huntington and the South Charleston campuses. To further broaden the committee's representation, the committee asked the VP for Academic Affairs to appoint a university administration representative.

The Committee reviewed the workload policies at many universities, including several of Marshall's designated peer institutions (e.g. SIU- Edwardsville, UN- Reno, U of South Florida, and ETSU). In virtually all cases, the peer universities' policies indicated both lower normative teaching loads than those expected at Marshall, and greater flexibility in faculty teaching assignments based on involvement with other projects, most notably research/scholarship/creative activities and service of different types.

Background

The importance of addressing a variety of faculty workload issues and the associated need for a flexible faculty workload policy at Marshall University has been clear for many years. While Marshall University leaders often voice pride concerning our dedicated and hardworking faculty, expectations for faculty productivity in teaching, scholarship, and service have been problematic in terms of a) clarity and consistency of policy implementation; b) comparisons between Marshall's faculty workload and that of peer institutions; and c) the impact of workload issues on recruitment, hiring, and retention of high quality, productive faculty members.

There are many reports and papers from the professional literature on the nature of university faculty workload policies and procedures as well as a history of Marshall committee reports on these issues dating back at least 10 years. While this is not the place to review or discuss all of the material, a few examples of Marshall's history of attention to this issue may be helpful. The Fall, 1992 Executive Policy Bulletin #1, describes a normal teaching load of 12 hours, but immediately notes that this may vary from college to college, depending on mission and purpose; that same document recognizes the importance of scholarship and creative activity, and encourages internal, external and "creative arrangements" to support it. Thus, the principle of flexibility in

work responsibilities and assignments is established. The very next year (October 1993), the Board of Trustees issued Administrative Bulletin #26, which clearly and explicitly calls for "flexible workload agreements" for faculty, and even suggests a model system from which to work. Minutes from Graduate Council meetings going back at least five years document committees concerned with this issue and working on proposals to allow for variability in faculty planning pages in the annual reports. Within the literature and peer institution policies that were examined, themes which routinely emerged included a) the need for flexibility; b) the recognition of an ongoing increase in the importance of research, scholarly and creative work and community consultation and development in the roles of university faculty members; and c) the value and emphasis that the university continues to place on all types and levels of teaching and academic activities.

It is clear that Marshall University is currently in a time of growth and change. President Angel stated a "vision" for the University that includes an increasing emphasis on research and on the development of new doctoral programs, providing research and technological service to the region, while also strengthening our long standing commitment to high quality undergraduate education. In each of these areas, faculty members have absolutely central roles to play, and each "growth challenge" is directly tied to faculty workload expectations. The 2010 Report is perhaps the most recent example recognizing the complexity of faculty roles and responsibilities at Marshall University.

Embedded within the University administration's goal of greater "prominence" for Marshall is the need to encourage greater scholarly and creative productivity by faculty via research, grants and creative works. It should be clear to all concerned parties that significant research or creative activity takes sustained time to plan, implement, evaluate and publish/disseminate. Thus, if we are to recruit and keep productive scholars and creative faculty, and if we want to encourage current faculty to become more actively engaged in the scholarly/creative arena, our workload policy for faculty must become consistent with these objectives.

The current workload policy places a very strong emphasis on teaching, and is relatively inflexible. Most faculty members, particularly on the Huntington campus, teach four courses per semester. To effectively teach four courses, advise students, and participate in department/university service activities is essentially a full time workload and within that context, scholarship/creative work is essentially "overtime" in the sense that it is done in evenings, weekends and during periods of the summer when not teaching. While many faculty members do manage to produce some excellent work in this workload environment, it is very discouraging over time to those with significant goals in the scholarly/creative arena.

Some faculty members do receive reductions in teaching load-typically for one of two reasons. The first is to engage in administrative activities; while these may be important tasks, the time devoted to administration is not available for scholarly or creative work, and thus does not address the need for encouraging greater scholarly/creative activity. The second common source of teaching reduction is from Faculty Development grants,

which fund one course release for one semester. While valuable, these grants are simply inadequate for addressing the issues discussed here. Faculty Development grants are few in number, faculty members cannot plan for or "count on" having one for a given year, and the one course/one semester reduction is frequently not sufficient to support sustained, high quality scholarly/creative work.

It is also important to note at the outset that not all faculty members have interests in developing or maintaining significant scholarly/creative programs. We believe that Marshall University will continue to be a strong teaching institution where a faculty member can and should be valued for having a primary emphasis in the varied dimensions of high quality teaching. Therefore, the committee believes that the most reasonable approach to addressing what might be considered the clash between current workload practice and the needs/expectations associated with Marshall's growth is to develop a flexible work load policy, as is described below.

Principles

Based on our review of current faculty workload practices at Marshall University and data from other universities- many of them our official "peer institutions"- we have identified several key principles or organizing dimensions to structure this discussion. These include the following:

(NOTE: Throughout the policy description, the term "division" and "division head" should be substituted for "department" and "department chair", respectively, as appropriate.)

Flexibility: Stated simply, growth of the institution involves increasing complexity. As we move into new projects and new programs, it is clear that a) faculty will be expected to fill a wider range of professional roles than ever before and b) more faculty than ever before will be needed to work in roles that may differ from expectations that were appropriate in earlier years of service. These will include grant development and management, supervision of dissertation and other student research, ongoing program development and evaluation for new, advanced degree programs, consultation with and service to businesses, government agencies, educational systems, etc. Each of these is critical, and each is time and resource intensive. To be successful, Marshall University will have to creatively address the diverse and complex requirements of the work associated with these demands, and have workload policies that are sufficiently flexible to encourage faculty work in all of these areas and to reward success within them.

Variability in Faculty Contributions to Institutional Mission: Intimately tied to the need for flexibility is the importance of recognizing and rewarding the varied contributions to the institution's mission that different faculty can make. The time honored tripartite vision of faculty work (Teaching, Scholarship, Service) does not necessarily require that all faculty can or should be expected to make equivalent contributions in each area. As our mission grows more complex, it will serve us well to

recognize and nurture the varied skills and interests of our faculty, while also recognizing the need to integrate the varied interests and skills of individual faculty into aggregate practices that ensure the University and its programs of meeting the goals of its overall mission.

Equity: Workload policies and practices must be fair. In practice, this translates into a system whereby expectations are clear, reasonable, applied to all faculty members in a consistent manner (while allowing for the flexibility and variability noted above), perceived as unbiased, and appropriately tied to the professional mission of each academic unit. To be perceived as equitable over time, policies need to promote evaluation of faculty work that is seen as equally fair and reasonable, given the flexibility and variability in workloads that are likely to develop over time.

Decentralization of Workload Assignments: The increasing complexity of faculty roles is likely to require that people closest to the required tasks be intimately involved with decision making in regards to the workload assignments of individual faculty. In most academic units, this is likely to be represented by an approximate sequence of a) the faculty member him or herself; b) the department faculty as a group (who function to help clarify department needs and priorities); c) the department chair/program director/division head; d) the college Dean; and e) The VP for Academic Affairs. Encouraged here is an institutional practice that encourages communication within and between all levels of academic units to identify needs and priorities, and to allow individual faculty, departments and colleges to clarify how best to meet those priorities within their respective units. In many universities, this is implemented through a system of negotiated faculty assignments managed by department chairs to ensure meeting of overarching department responsibilities by the department as a whole, with oversight provided by the dean and/or VP for Academic Affairs.

Accountability via Evaluation of Differential Responsibilities: As faculty members' workload responsibilities become more varied, it is important that appropriate methods of evaluating differential work responsibilities be implemented. As faculty members develop relatively higher or lower commitments to research, to teaching or to service activities, they should be expected to document differential productivity in these areas and be evaluated (for annual evaluations, as well for promotion and tenure) in relation to that differentiated load in a manner that is perceived by faculty and administrators as appropriate and as equitable.

Workload Tied to Demonstrable Activities: Faculty workload should, to the extent possible, be tied to specific, identifiable tasks and responsibilities, rather than to more general constructs or issues (e.g. graduate or undergraduate level, traditional or non-traditional population). The relevant, concrete question to be addressed here becomes what is the faculty member doing with his or her time that warrants a specific overall workload? The faculty member's response to this question is to propose a set of teaching, scholarship/creative and service activities that is in line with his or her goals while also meeting the stated needs and priorities of the academic unit. Considered in this way, workload decisions focus on the time associated with particular work, the perceived value

of that work within the mission of the "unit" (program, department, college) and the importance of balancing program, department and/or college needs with the range of skills and interests of department faculty.

A Flexible Workload Policy

The intent of the principles described above is to serve as a foundation for development of more specific, flexible and equitable workload policies and practices to reflect and enhance the developing environment or "culture" emerging at Marshall University.

The following proposal for a workload policy is based on the principles outlined above. It is clear that the needs for and expectations of faculty vary by discipline and by college, and thus no university-wide policy will be able to articulate a single formula to answer all workload related questions. Ultimately, these will fall to negotiations between individual faculty members, their department chairs, and the respective deans. Nevertheless, the committee wants to emphasize several key points:

1. The flexible workload policy is designed to support and enhance the opportunities for faculty to work in ways that are consistent with their interests, goals and skills, while also encouraging academic units to think creatively about their needs, priorities and resources. Given the expanding role that Marshall University intends to play, coupled with ongoing limits in financial resources, this flexibility will be critical.
2. The policy is not intended to require or favor any particular set of professional skills or activities, nor should it be seen as necessarily requiring changes in criteria for critical decisions such as tenure or promotion or graduate faculty status. Under a flexible workload policy, the University and/or specific units would still articulate tenure and/or promotion requirements; faculty, chairs and deans would need to carefully consider these as faculty develop and chairs/deans review and approve workload plans for faculty members who are working toward P&T decisions. The proposed policy is designed to increase flexibility in workload for both new and experienced faculty members, and not to supplant or replace any minimal criteria for promotion or tenure or graduate faculty status. As always, for important decisions such as promotion and tenure, it is important that all units clearly define their expectations for each area of faculty responsibility such that individual faculty members, chairs and deans can consider how individual work load plans will enhance or inhibit progress towards those important goals.
3. The permissible ranges of workload associated with each area of faculty responsibility; Teaching (see p. 10), Scholarly/Creative Activities (see p. 12), and Service (see p. 13-14), are presented as outer limits, they are not necessarily going to be freely available to each faculty member to simply choose or for each chair or dean to assign to individual faculty each year. They are presented to underscore the possible range of effort that is possible for faculty to engage in while still being active, productive and valued. In

addition, it is important to note the possibilities of individual exceptions to the designated ranges for each area; this is discussed in the "Exceptions" section (see page 15).

4. To be successful, the policy will require a significant financial commitment for the addition of new faculty lines. Over-reliance upon, or a significantly increased use of part-time instructors is not an acceptable strategy for meeting the teaching needs that are likely to emerge from increasing flexibility in faculty work efforts. If the university is to encourage and support the range of faculty activities associated with increasing prominence in new areas, the financial support for appropriate numbers of highly qualified faculty must be a prominent feature of the planning process.

Timelines

The policy proposed here will need to be phased in. Within the first semester after the policy is adopted, all units would do the internal assessment, planning and defining of criteria and accountability expectations discussed elsewhere that will be needed to implement a more flexible workload. As soon as possible after that, and within one additional semester, each unit would develop its plan and clarify the resulting personnel-related needs to allow the greater flexibility in faculty loads, up to the maximum range for each area of faculty work included in their unit's plan. At the same time, each unit will begin a first phase of implementation by identifying the degree of flexibility in each area of workload that is possible for the next year. Thus, departments might be able to allow each faculty member a small amount of flexibility in one or more areas for the next year, or they might identify one or several faculty who would be allowed greater flexibility, given the needs and priorities of that department.

In year two, each unit will have the opportunity to refine its process, and increase the range of flexibility allowed to faculty. By year three, the full range of flexibility (modified by units as needed) would be operational.

Process

For an individualized, flexible workload policy to be effective, there must be a sense of "buy-in" by all concerned parties. Thus, it will be imperative that all academic levels within the university are actively involved in the development and implementation of this policy. The Provost/VP for Academic Affairs will need to oversee the process, ensure that all colleges participate in ways that are fundamentally equivalent across the university, yet also flexible enough to meet the divergent needs of each college, and provide for the necessary funding that will support this increased flexibility. The funding needs will vary from unit to unit, and may be as little as a few additional graduate assistants or part-time faculty or as high as several new tenure track lines.

Colleges and departments will need to develop a process whereby a) a range of acceptable workload contributions in all service areas is identified along with appropriate accountability indicators for all activities; b) all units (programs, departments/divisions

and colleges) identify their aggregate or overall needs and priorities for faculty productivity or contributions in each area; and c) individual faculty members have meaningful opportunities to develop individual work load profiles that are consistent with both their own career development and the needs of the department and college.

College Deans will oversee the development or refinement of their College's general expectations for faculty workload and of department procedures for approving workload plans and subsequent evaluations of workload contributions. Of particular concern in this regard is that Deans ensure that all department plans include specific criteria and equitable procedures. College and department plans and procedures will need to be consistent with expectations for promotion and tenure and for annual reports. They should delineate the acceptable ranges of faculty contributions in each of the major areas of responsibility, the criteria for exceptions to these established ranges, the type of activities that will be included in each category and specific methods by which faculty members will document and/or demonstrate progress in their work in each area.

Departments and Divisions have the responsibility of developing workload procedures and criteria that are clear, that provide all department members with equitable opportunities to develop and implement their workload plans, are appropriate to their disciplines and are consistent with the needs of their students and programs. Departments will meet periodically to review needs and priorities for faculty contributions in teaching, research/creative activity and service within their respective program areas. As appropriate, departments will clarify how college-wide criteria for promotion and tenure are met through the department's criteria and procedures. All such clarifications or any other periodic changes to department procedures are subject to approval by the College Dean.

Individual faculty members would meet annually with chairs to develop workload agreements for the next academic year. These meetings should be done prior to the submission of Fall schedules. Each workload agreement would describe the faculty member's plans regarding specific contributions in each major area and his/her plan to document and/or demonstrate progress or achievement in each area of effort. Plans are to be based on the department's approved procedures and criteria, its list of recognized or acceptable activities, the priorities and needs of the department and on the acceptable range of workload effort for each major area.

While the workload planning and review process will occur annually, a minimum two-to-three year "window" or time frame will be used for proposing and evaluating progress on scholarly/creative activities; the exact period would be determined by each college or department unit. This time period should recognize the time and effort needed to develop, implement and disseminate different types of scholarly/creative work. Within the time frame adopted, faculty members are expected to demonstrate annually the progress they are making on their scholarly/creative projects, particularly when such projects are the basis for modifications to workload responsibilities in other areas.

All individual faculty workload plans are to be negotiated between faculty members and their chairs. The deans will have authority for approving all faculty workload plans, for ensuring that college teaching needs are met and that workload agreements are developed and implemented fairly within and across all departments/divisions within his or her college. Deans (or their designates) will serve as the first level of appeal outside the department in any circumstances where faculty members believe that their workload plans are being treated unfairly. The VP for Academic Affairs will be responsible for final approval of all workload plans and for overseeing that workload policies developed by each college are equitable and enforced fairly across the University. Further, the VP for Academic Affairs will establish a procedure for hearing individual faculty concerns about workload decisions that are perceived by a faculty member as biased, discriminatory or otherwise seen as unfair, and which have not been resolved through discussions at the department or college level.

Each unit retains responsibility for articulating criteria for and evaluating applications for promotion and tenure. Thus, for this policy to succeed, it is critical that these criteria and expectations be clearly communicated within the unit, and that individual workloads be structured such that faculty have every reasonable opportunity to meet them.

Work Load Range for Professional Areas of Service

Peer institutions vary in the exact ranges of effort within each workload area (teaching, scholarship, service) they permit for faculty members' flexible work plans. It appears to be typical, however, that some minimum effort in each area is required, although there are institutions that allow for the possibility of 100% effort in just one area. Given Marshall University's needs and resources, it is unlikely that such extreme commitment to any one area of effort would be desirable or supportable, except for very unusual or special circumstances that would require careful consideration and endorsement by the involved faculty member, Chair, Dean and VP for Academic Affairs.

As academic units develop their expectations associated with specific ranges of workload efforts, it will be important to recognize the interaction between different workload areas, and that higher or lower percentage efforts are not necessarily simply higher or lower amounts of the same activities. For example, if a faculty member's workload emphasizes teaching, and devotes only 10% to scholarly or creative activities, then his/her activities in this area cannot be expected to simply be a smaller amount of the same activities that a colleague with 60% workload devoted to scholarship or creative activities would be expected to do. For example, a 60% focus on research might be associated with major research projects and/or significant research grant activities, and would likely be tied directly to expectations for significant publication and major conference presentations. A 5% research focus, on the other hand, might well be focused on research and scholarly activities more directly tied to teaching; perhaps literature or book reviews, pedagogically oriented "local" research projects, presentations based on student research he or she has supervised, applied projects in collaboration with community organizations, etc. For a faculty member with an 85 % teaching commitment, it might be reasonable to expect significantly more in the areas of course and program development, supervision of

student projects, advising and/or other classroom activities than you would expect from a college with a 30% teaching load. A wide variety of work load profiles could represent significant professional contributions in activity areas that are equivalently valued by the department and college, and each faculty member would be expected to demonstrate/document success in all workload areas.

As is noted in the Exceptions section (see page 15), the ranges given below should be seen as typical outer limits for faculty work. Nevertheless, there may be unusual individual situations that simply do not fit within the limits provided; these cases will need to be handled individually through special negotiations between the faculty member, his/her chair, dean, and the VP for Academic Affairs.

The outer limits of the categories are not guides to a 100% workload. A cursory glance reveals that any individual could mistakenly make commitments that total more or less than 100%. Faculty, chairs and deans will need to insure that full time, 1.0 FTE faculty plans total 100% effort each year.

TEACHING: 25-90%

Teaching includes a wide variety of activities, including responsibility for “standard” on-campus 3- or 4- credit courses (which vary in their time demands for many important reasons), travel to teach off campus courses, teaching labs, advising students, supervising independent studies, field work and internships, course development, supervision of student research or capstone work, serving as chair or committee member for theses and dissertations, integrating technology and other innovative strategies into educational efforts, etc. These (and other teaching related activities not noted here) are all time consuming activities, and must be clearly recognized and “credited” in any flexible policy. In consultation with their chairs, and based on the priorities and needs established by their respective academic units, faculty members identify a percentage of work effort to be committed to the teaching area, and describe the specific activities that are components of that effort and on which they will be evaluated. (NOTE: Colleges or departments may decide that units other than “credit hours” are more appropriate measures of some faculty activity (e.g. “contact hours” for some science labs); such substitutions and discussion of their effects on calculations of faculty workload should be included in the college’s or department’s workload planning documents.)

Key points for consideration of this area of professional effort include:

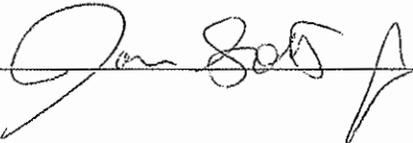
1. For a tenure-track faculty member who maintains an “average” or typical advising load (as defined by the unit) each 3-credit course, up to three courses per semester, is normally calculated as representing 25% of total work effort. Thus, a 9 hour load would be considered to be 75% of a faculty member’s total effort. Within that 75% is included an “average” advising load and “reasonable” (as defined by the unit) availability to do other work associated with teaching, such as developing one new course in one’s area of expertise, or supervising independent study students, or serving on a small number of thesis committees. The specifics

are to be articulated by each unit, but the point is that a teaching workload of 75% includes some reasonable amount of work outside of the assigned classes, but additional responsibilities must be assigned appropriate credit within the workload plan. A 12 hour load with no more than three preparations would be 90% of effort. A 12 hour load with four preparations would be considered to be 100% effort, with no additional expectations; this would typically be a load only assigned to temporary, non-tenure track faculty. It is worth emphasizing that the 9 hour (75%) teaching load is the maximum that was noted as "typical" in our peer institutions. To the extent that the emerging "culture" at Marshall University includes expectations for faculty to make significant, sustained contributions in scholarly and creative activities, a similar upper limit on teaching commitment will be needed for significant numbers of faculty across the institution.

2. For purposes of workload calculations, no distinction is made between undergraduate and graduate classes. Peer institutions vary widely in how they handle this issue, and the committee could see no clear evidence that the level of course, in and of itself, is a factor in the amount of time needed to teach it. Depending on a number of variables such as number of students, teaching techniques employed, nature of class assignments and out of class contact with students, any class can be very time consuming. Rather than associating workload effort with the level of the class, this policy associates it with specific activities (e.g. course development, travel, lab activities, frequency and intensity of interaction with students) that are valued by the units and that require time to implement successfully. Of course, within some disciplines it may be clear and accepted that some types of classes are more time intensive than others, and that can be included in that unit's policy.
3. Under normal circumstances, faculty members-even those with funded research programs- will not go below a one course teaching load with an average advising load; this would account for the 25 % level in teaching. Two 3-credit courses would typically account for 50% effort, while three would be associated with 75% effort. A 90% effort level would be for faculty who intend to focus substantially all of their efforts into the teaching area, and have little or no interest in pursuing the development of traditional scholarly products during the time period covered by the agreement. Other than teaching four 3-credit courses, the activities beyond traditional classroom teaching associated with the teaching category include such work as supervising students in independent studies, theses and other research activities, special educational projects, and course development. It is important to note that the examples used are based on 3-credit classes, which are the most typical course credit assignments in the University. Naturally, units which make use of 1-, 2-, 4- or other credit courses within their curriculum, or which use "contact hours" or other measures of faculty involvement, will need to make adjustments in calculating what will be meant by a specific percentage effort in the teaching area.
4. It is important to emphasize that an individual faculty member's teaching effort consists of a variety of activities, and thus significant effort devoted to thesis supervision or independent studies should be recognized as important, time consuming activities that must be valued and counted in faculty work loads. For

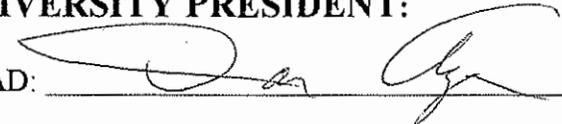
existing resources, the Committee believes that discussions and decisions regarding such resource allocation should be addressed via cooperative discussions between Faculty Senate, Graduate Council and the University Administration. While we recognize that funding issues are tied directly to workload, we also note that movement towards implementation of this policy can proceed concurrently with budgetary analyses. Budgetary issues may impact the speed with which aspects of the plan can be implemented, and/or the degree of implementation possible in a given time period, but the essential principles and procedures of the proposed policy can be implemented within any specific budgetary constraints. In other words, the degree of flexibility within colleges and departments may be limited by budgetary concerns, but the principles and procedures of a flexible workload policy can nonetheless be developed and implemented.

FACULTY SENATE PRESIDENT:

APPROVED
BY SENATE:  DATE: 6-18-03

DISAPPROVED
BY SENATE: _____ DATE: _____

UNIVERSITY PRESIDENT:

READ:  DATE: 7-14-03

SEE COMMENTS ATTACHED.

As indicated previously, this policy was approved contingent upon the inclusion of the following language.

ADDENDUM

Notwithstanding any provisions to the contrary contained in this policy, the suggested workload levels are only guidelines and not finite rules to be adhered to by Marshall University, and that the terms and implementation of this policy will ultimately be contingent upon and subject to the availability of funds and the educational needs of the students. Final approval of any faculty workload plans or policies shall rest with the Senior Vice President for Academic Affairs or other designee of the President of the institution.