

The University of Louisiana at Lafayette

INSTRUCTIONS FOR COMPLETING FACULTY WORKLOAD FORM

The University of Louisiana System Policy Number:FSIII.X-D-1 Review of Faculty Ranks that states "that all faculty members should be evaluated at least annually by the department chair/head, with review by the dean. The evaluation should be based on the faculty member's job responsibility. The evaluation process must indicate various levels of performance ranging from "unsatisfactory" to higher levels."

At the end of each calendar year, each full-time, continuing faculty member completes the Faculty Workload Form that details work completed, teaching, research, service, and administration during the calendar year just ending and includes a Planning and Self-Evaluation sections. The Faculty Workload Form, Addendum A (Externally Funded Projects Effort Report), and instructions for both may be found on the Academic Affairs website www.academicaffairs.louisiana.edu.

At the time of completion of the Faculty Workload form (and at new hire), a faculty member's workload track and evaluation weights will be reviewed by the Department Head and approved by the Dean. Faculty members are advised to review departmental and college faculty evaluation rubrics.

Faculty Workload Form

Personal Data

In the blanks on the top of the form, enter your name, CLID, rank, tenure status, college, department, the workload track to which you have been assigned (I, II, III, IV, or V), and calendar year. A faculty member's track will be determined in consultation with his/her department head and dean. If using the fill-able pdf version of the form the following are drop down menus; rank, tenure status, college, department, workload track, and calendar year.

This portion of the form lists the references necessary to complete the form, and provides general descriptions of the Workload Tracks. For additional information regarding each workload track, reference the Faculty Handbook Document XXI the University of Louisiana at Lafayette Faculty Workload Policy. Please review the Instructions for Completing Faculty Workload Form for specific information on filling out the Faculty Workload Form.

Planning and Self-Evaluation

This section replaces the previous "Projected Activity" section of the Faculty Workload Form. Faculty are required to complete the Planning portion of the form by either checking the box: "My work-load activities will not change for the upcoming plan year" or checking the box "My workload activities and plan will change for the upcoming year. If so please explain in the space below." This space is for noting changes in; Workload Tracks; weights of teaching, research, service, and/or administration; changes in activities i.e. developing a new course, revising an existing course, implementing new teaching technologies, and faculty development; significant changes in the focus of research, scholarship, and/or creative activities; changes in service, including advising, professional, community and/or university; and changes in administrative responsibilities. Both the faculty member and the unit department head/director sign this section to acknowledge whether the faculty member or the unit department head/director recommend changes for the upcoming plan year.

Please note that if you are projecting any externally funded projects, you must also complete Addendum A, "Externally Funded Projects Effort Report (Projected). Reporting requirements of the federal and state governments necessitates the latter form. If you need assistance with Addendum A, you should contact the Office of Research and Sponsored Programs.

The Self-Evaluation portion of this section is optional at this time, and provides faculty an opportunity to

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University of Louisiana at Lafayette

perform a reflective review of their workload activities completed during the calendar year just ending. Self Evaluation can assist a faculty member to: improve the educational experiences of their students, identify professional education opportunities necessary to further develop one's capacity to teach and research expertly and, prepare for performance review with the department head. Self-evaluation can range from personal reflection to formal assessment. Based on a constructive self-evaluation of your abilities to teach, conduct research and scholarly activities, and participate in service activities, please indicate your evaluation of the previous year.

Actual Activity

In December or January, a faculty member must submit a report of work actually completed during the previous calendar year. Each section includes a space for notation of the department/school/unit's rubric which may be used to summarize or to include the complete appropriate section of the rubric.

Section I: Instruction

List in this section instructional activities from the previous calendar year.

- Section A lists regularly scheduled classes, their respective section numbers, assigned credit hours, contact hours, type of course, and actual enrollment based on the number of students who completed the course earning a grade of A-F.
- Section B provides space to list individualized instruction such as independent studies or projects, internships and practicums, honors thesis, honors contract, etc.
- Section C provides space for identifying the name of a student whose graduate project, thesis, synthesis, or dissertation you directed or are directing.
- Section D is the place to list any graduate project, thesis, synthesis, or dissertation committees on which you served as a member. Here too you should list your role in a graduate student's comprehensive exam committee.
- Section E provides space for other instructional activities and innovation, e.g. explain developments in course technology, distance learning, mentoring, retention, student research, and/or course travel.
- Section F is the place to list faculty/educational development activities relating to instruction and teaching, e.g. seminars, workshops, and discussion groups.

In Part A list the courses you actually taught during the calendar year just ended. Note that this section requires you to enter the actual enrollment (both undergraduate and/or graduate) of each course. The comments column allows you to point out anything about the course that was notable, in terms of your workload, for instance, innovations that enhance rigor and quality of student learning, whether a course was a new preparation or was taught as an overload. This section may be used to explain unique class formats, e.g. a single course that has a lecture, lab, and clinical component and/or is taught by multiple faculty members.

Parts B, C, and D all require that you enter the name(s) of students enrolled. Parts C and D are for graduate projects, thesis, synthesis, and/or dissertation students whose work you are chairing/directing or a committee member. If you are directing, you must also indicate the cumulative number of semesters each student has enrolled in your thesis or dissertation course.

The subtotal should indicate your judgment of the percent of your workload for each semester that was attributable to all these teaching duties. This percentage, which must fall between the limits determined by your assigned track, will determine the weight of your Teaching score in the overall evaluation. As a guide, please note that a traditional three credit, three contact hour lecture course is generally construed as 20% of one's workload.

Revised 12/11/2013 by Academic Planning and Faculty Development

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Section II: Research/Scholarship

In this section, itemize all research, scholarly, and creative activities in which you engaged during the year just ended.

The weight of your score in this category is determined by the percentage of your workload attributed to category, which must fall between the limits of your specific track.

- Section A lists specific research, scholarly, and creative activities not funded by any grant or award. Included here would be, for example, work on a journal article or book, preparation of a grant proposal, a creative presentation, a presentation at a professional conference, and the like.
- Section B includes research, scholarly, and creative activities that are supported by a University-funded award, such as a Summer Research Award, Sabbatical, and Faculty Development Grant.
- Section C includes research, scholarly, and creative activities that are supported by externally-funded grants and/or contracts.
- Section D includes educational development activities related to research, e.g. grant writing workshops, trainings, and seminars.

Please note that if you have any externally funded projects listed here, you must also complete Addendum B, "Externally Funded Projects Effort Report (Actual). This form is necessitated by reporting requirements of the federal and state governments. If you need assistance with Addendum B, you should contact the Office of Research and Sponsored Programs.

The subtotal at the end of this section should indicate your judgment of the percent of your workload for each semester that was attributable to all these research, scholarly, and creative activities. This percentage will determine the weight of your Research score in the overall evaluation.

Section III: Service

Here in your report of actual activity, you should list your accomplishments in service efforts during the previous calendar year.

- Section A should include an explanation of efforts to enhance educational engagement of the student through advising, mentoring, student organization advisor, awards, etc.
- Section B is for professional service including: service at the local, regional, and or national levels in professional organizations in the following capacities: officer, reviewer, session chair, program coordinator, journal editor, editorial board, panelist or featured speaker, etc.
- Section C is the space for explaining participation in university governance through committees, task forces, Faculty Senate or special projects such as accreditation, recruitment, retention, etc.
- Section D is typically reserved for service contributing personal time for pro bono work for a non-profit organization using expertise from one's discipline, presenting continuing education programs, public boards or organizations, etc.
- Section E is for listing faculty development opportunities related to service that might include advisor trainings, orientations for organizations, and board, etc.

The subtotal at the end of this section should indicate your judgment of the percent of your workload for each semester that was attributable to all these service activities. This percentage will determine the weight of your Service score in the overall evaluation.

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Section IV: Administration

In Section IV list those administrative duties for which you were granted a course reduction during a regular semester of the calendar year just ended. The Dean and Vice President for Academic Affairs must have approved those reductions.

- Section A for defining leadership roles and activities for department heads, directors of schools/centers, associate/assistant deans, assistant department heads, or graduate and program coordinators.
- Section B is for outlining strategic initiatives, developing a vision and building consensus and support for units mission and goals.
- Section C is for explaining efforts to foster communication between stakeholders, serving as an advocate for the unit, working collegially, and conveying decisions, policies and procedures, etc.
- Section D management of the unit demonstrating ways the unit operates efficiently and effectively.
- Section E is for role specific responsibilities e.g. development, recruitment, and accreditation.

The subtotal for Section IV should indicate your judgment of the percent of your workload for each semester that was attributable to your administrative duties. This percentage will determine the weight of your Administration score in the overall evaluation.

Notes

The faculty member may use this space to further explain accomplishments of teaching, research, service, and administration may use this portion of the form.

Total Workload

Each semester's total workload is always 100%. The subtotals of Sections I - IV should therefore add up to 100%.

Evaluation Procedure:

1. The faculty member completes the Faculty Workload Form.
2. The Department Head will rate each faculty member on a scale from 1-5 in each of the four categories: Teaching, Research/Scholarship, Service, and Administration (where applicable).
3. The general University evaluation scale as well as College- or department-specific rubrics will apply.
4. Each score will be weighted according to the percentage effort allocated for that faculty member to that category. The average of these scores will be the final score.
5. The Dean will then have the ability to adjust the final score up or down by .5
6. The Provost will then have the opportunity to adjust final individual scores up or down by .25.
7. If the Dean or Provost determines that the average score for a particular department is unrealistically high or low, either can request that the Department Head adjust and resubmit the ratings.

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