

UC Santa Cruz Principles for Department¹ Instructional Workload Policy
Office of the Executive Vice Chancellor
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Departments are required to maintain a written policy explicitly describing expectations for ladder faculty instructional workload. Instructional workload policies support several campus objectives:

- Managing teaching resources to sustain curriculum capacity
- Maintaining a commitment of ladder faculty to undergraduate education
- Ensuring overall faculty workload equity
- Complying with UCOP commitments made to the State

Policies should be framed on the historical campus Five Course Equivalent Policy first documented by Chancellor Sinsheimer. This policy states that ‘the normal teaching load is five courses (or five course equivalent, based on lab courses, heavy independent study commitments, etc.)². This was reaffirmed by EVC Michael Tanner³ in 1993. Deans and Chairs should exercise careful oversight in determining the particular number, value, and use of course equivalencies. Department workload policies are reviewed on a regular basis in conjunction with the external review process. The following Principles should be the foundation for departmental policies.

1. Departments are established with the expectation that they have sufficient faculty resources to offer stable undergraduate and/or graduate curriculum.
2. Faculty teaching assignments should be made on the basis of department designed policy and applied uniformly across all faculty members in the unit.
3. Departments with fixed teaching loads for all faculty members should reexamine their practice. Research and service contributions vary significantly across individual faculty and their career phase. The overall workloads should be equivalent, which means that workload in the area of teaching might vary for equity to be achieved.
4. Course release is not a faculty entitlement. Course release is approved only within the context of department responsibility to ensure students normal progress towards degree.
5. Course release as a form of compensation should be judiciously used, especially for the burdens of departmental and administrative service. Alternative forms should be sought, such as assignment of small enrollment courses, summer ninths,

¹ In this document, the term Department refers to formally established departments holding budgeted faculty provisions to which ladder faculty and SOE lecturers are formally appointed.

² Chancellor Sinsheimer to the College Provosts and Deans, May 31, 1978.

³ EVC Tanner to Divisional Deans and Board Chairs, February 19, 1993.

larger stipends, or research support (GSRs, readers, etc.) to partially compensate for time taken from research activity.

6. In instances where incentives for recruitment and/or retention are necessary, the general principle outlined in #5 should be the primary course of action. When multi-year course release is appropriate, written agreements are required and include an end-stop, sunset clause, or time limit when the agreement will be terminated. This requires the agreement be revised by the faculty, department chair, and/or the dean, as appropriate.
7. Course release requires decanal review to ensure equity across departments in the provision and amount of course release granted for department administration and to guard against the potential that course release could undermine faculty equity, creating perceptions of privileged and non-privileged faculty.