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## Faculty Senate Chronicle April 28, 1994

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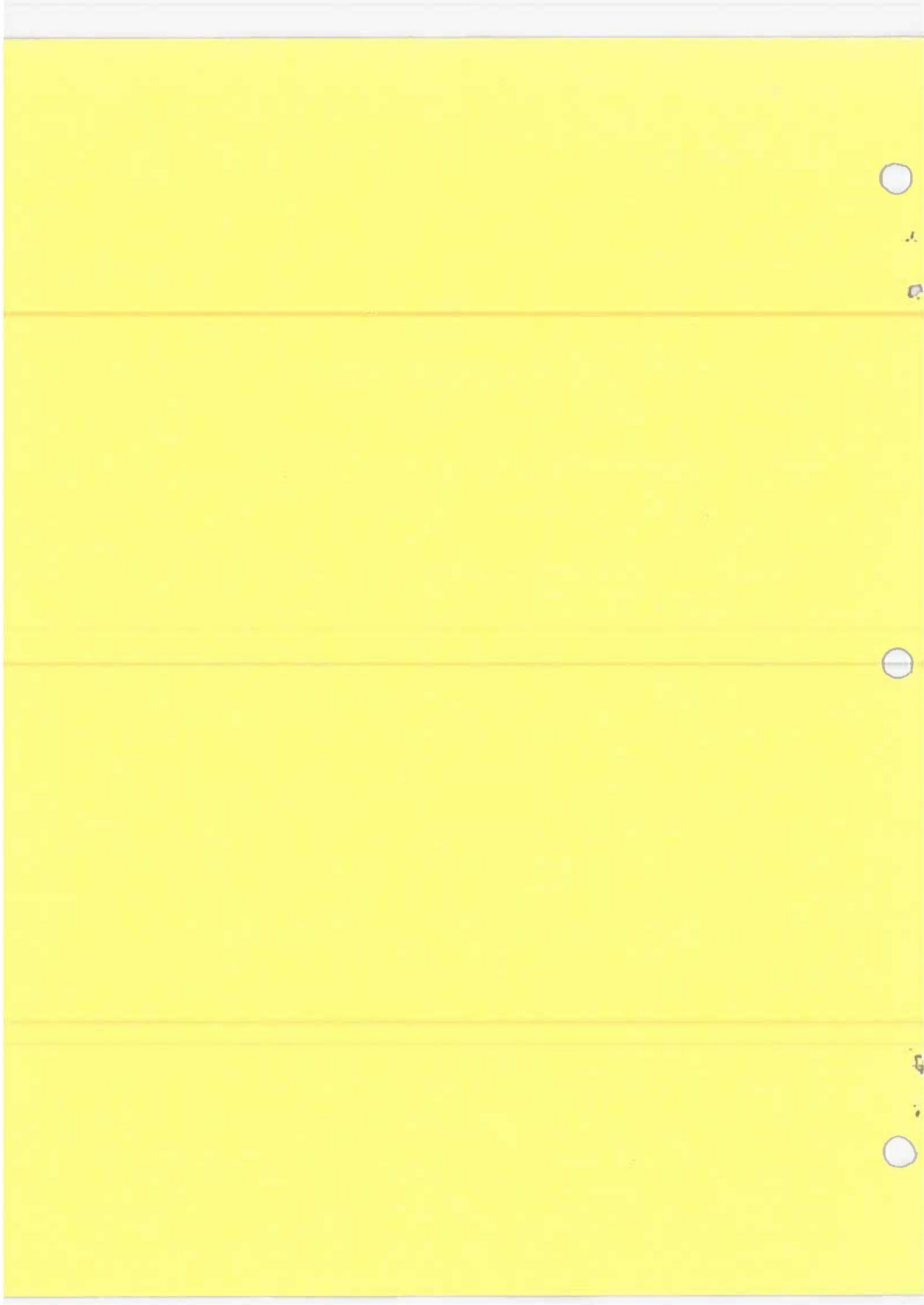
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Any comments concerning the contents in The University of Akron Chronicle may be directed to the Secretary, Mr. David Brink (+1707).



CORRECTED

**THE UNIVERSITY OF AKRON FACULTY SENATE  
MINUTES OF THE MEETING OF APRIL 28, 1994**

The special meeting of the Faculty Senate was called to order by Chairman Gerlach at 3:00 p.m. on Thursday, April 28, 1994, in the Goodyear Lecture Hall in the College of Business Administration.

Forty-nine of the fifty-five members of the Faculty Senate were in attendance. Senators Cohen, Frank, Stafford, Sterling, Stull, and Wright were absent with notice.

**SENATE ACTION**

- **APPROVED WORKLOAD POLICY**
- **DEFEATED PROPOSED BYLAW VII, B, 3**

**ITEM NUMBER 1 - UNFINISHED BUSINESS**

A. **Workload Policy - (Report of APCC Committee)** - Senator Oller noted a few omissions which arose during the duplicating process. First of all, it was sent out without pagination, so to help in the discussion, he asked Senators to number the pages, 1 through 7. Second, at the bottom of page 5, a section had been omitted after it had been distributed. It was section B, Administration, which should read: "Other part-time administrative assignments may be made on the recommendation of the faculty, department head and the academic dean. Such appointments must be based on an explicit description of job responsibilities." Two other corrections were on page 4, section F, Special Cases. The last sentence should read, "...in these cases" rather than "in these case". In the next paragraph, the sentence that read: "For departments or programs that differ significantly from the above classification, e.g. those having graduate programs but no, or few, undergraduate ones (for example, Polymer Chemistry)". The correct term was Polymer Science. Finally, wherever the word "research" appeared, it should read "re-search/creative activity".

Senator Oller said the document had two sections. There was an introduction that gave a history and rationale. It treated the history of the Faculty Workload Legislative Mandates from Columbus with the specific mandate that there be a University policy approved by the Board of Trustees by June. Policies at the college and department levels must be approved by fall of 1994. The next section contained the policy which was to be discussed and approved. He thanked the members of the APCC Committee. Senator Oller felt the members who met for the April 12 meeting did an excellent job in formulating this document. It was a real team effort and one of the best meetings he had ever attended at this institution. He also wanted to thank in particular, Senator Richards, for all of her help from the beginning of this project up to today. With that, he moved adoption of the document so it could be discussed.

Chairman Gerlach noted it was moved and seconded by the committee that this document be approved.

Senator Oller said the document represented a merging of aspects of two other documents. One was the Report of the Regents Advisory Committee on Faculty Workload Standards and Guidelines, which the Columbus committee put together and which gave guidelines to use in putting the new policy together. The second was the old University policy that was adopted in 1979 but which could be traced back to 1976 when the basic draft was written by the Faculty Rights and Responsibilities Committee and approved by University Council.

He said the University policy took material from the Regents Advisory Committee's Report, the main points of which were, first, that three activities made up full-time faculty workload-teaching, research and service. All three of those activities were to be factored in the effort that an individual put forth on a weekly basis. The committee did not give set percentages as to what the breakdown was supposed to be. The idea was that the percentages would vary from unit to unit, from department to department, from college to college. So flexibility was incorporated into the original document from Columbus and into the University document. Policies would be formulated at all three levels. What was before the body today was the general University policy that would be used as a guide or model for the colleges and the departments to create their own workload policies. The Columbus committee was concerned that this be a department-generated activity, that the policies come from individual departments, as they know best how their workloads should be divided up. What he hoped would be approved today was a policy that could be approved by the Board and then given to the colleges and departments to use in formulating their own policies.

One thing the committee in Columbus did stipulate was even though there was flexibility and the percentages could vary in terms of how much time was devoted to teaching, research and service, the total teaching effort of the unit, of the department, of the college, had to fall within certain specified ranges. He said he had come up with the shorthand "TTE" to refer to these divisions: "TTE", the total teaching effort. A department could divide up individual loads however it wanted, but the total teaching effort at that department, semester by semester, had to fall into specified ranges. Those specified ranges were listed in the first section, University Policy, under "Faculty Workload" for a baccalaureate department basically just active for undergraduate programs, baccalaureate/masters, and baccalaureate/masters/doctoral. The idea was that if every department and every unit did this and the total teaching effort fell into the specified range, the 10 percent increase for the entire University would be taken care of. The major points to be considered in formulating individual policies were also taken from the Regents Advisory Committee Report and were found in section II of the document on page 4. These were things to be considered once the appropriate mission category was chosen.

Finally, he said, there were the "General University Guidelines". This material initially came from the old 1979 policy. There the "load credit hour" was used as a method of quantifying certain kinds of activities that would be counted as a part of load. In the second paragraph, the activities included in load credit were described: teaching, administrative responsibility, research/creative activity, instructional support and service. What was suggested was that an individual would have 12 load hours per semester, 24 per year, and that in dividing up that load, a person would be getting load credits for those activities depending on what was being done that semester. How this was arranged would be negotiated in departments, but the total load had to amount to 12. One thing that should be pointed out was that in the past, service, things like what

Senators were doing today, had not been considered a part of load hours. It was additional duties done as a part of the job. The thinking of the APCC committee members, and it seemed to be the thinking of the people who sat on the committee in Columbus, was that if the work a person did was valuable to the department and the University, then credit should be given for doing it. It should be considered a part of one's load. In the past, credit had been given for research, but was considered to be released time; it was time released from teaching duties in order to be able to have a bit more time for research. And, of course, there was no released time for service. This document was suggesting the opposite, that research and service should also be counted as a part of a 12-hour load.

Senator Ranson commended the committee for producing a very interesting and useful document. Several people in the Humanities Division of Arts & Sciences had approached him and said they were very happy with it, and perhaps he could show why. English was one of the departments having baccalaureate and masters courses that would fall in the range of 60-70% teaching. That excited him and some of his colleagues very much; they habitually taught 21 hours a year, and a little quick calculation showed that teaching loads would be reduced. He was looking for some wonderful and merciful release from teaching duties while he went about his other responsibilities.

Senator Ranson also had a couple of amendments that concerned matters of history and the need to record various elements of how the University arrived at this place in 1976. He said he had prepared a printout of the amendments and also the rationale for them. He did not think either of them were controversial, but the person who gave him the information suggested it would be useful to encode this in the history so there would be even more idea of how things developed.

Chairman Gerlach asked if these amended the initial segment and not the policy statement. Senator Ranson stated that one amendment was to page 2, the first line, and the second amendment was to page 6, item 4, Instructional Support. He moved the amendments. Seconded by Senator Oller. Chairman Gerlach said the first amendment was on page 2, first line, to insert the words "May and October of 1976, and slightly modified" in September of 1979.

Senator McGucken wondered if that was in order. He understood the discussion was of university policy and this would begin on page 3. If it was the intention to publish in the Chronicle what Professor Oller described as the introductory historical material, the first amendment could be accepted as a friendly amendment for informational purposes.

Chairman Gerlach commented that if the Senate would indulge the Chair, he proposed simply to accept this slight addition to the introductory part and pass on to the next item. Hearing no objections, what was now before the Senate was a specific amendment to the policy statement itself, page 6, under item 4, Instructional Support. Line 3 included the words, "developing and preparing new programs, etc." The motion was to insert the words "and/or courses", so that it would read: "developing and preparing new programs and/or courses."

Senator Glaser said he had spoken against this when the APCC considered the document and he wanted to speak against the insertion of the word "courses" here, too. The rationale was only partially complete. It noted the original load policy passed by University Council in 1976 which included the phrase, "developing and preparing new courses or programs." But in the document which was in existence at the University now, which was passed in 1979, there was a

section called "Activities not Eligible for Load Assignment." Item C included the phrase, "preparing new courses or programs." So while this was correct in '76, the later change was not included in the rationale. In the discussion in APCC he saw a need for a load assignment for creating new programs because this was extensive work. But it seemed to him that the creation of a new course was part of a normal teaching assignment, that it was part of what faculty regularly do, and that it was not deserving of course load credit.

Senator Oller said he would speak in favor of the motion since in an earlier draft in APCC, "courses" had been inserted and he spoke in favor of it there. He understood what Senator Glaser was saying and to some extent he agreed that it was part of the job. But he could foresee certain instances where certain types of courses that were being initiated might require a great deal of work. An example would be a multimedia-type approach where a person would have to learn a whole new technology, a whole new way of presenting the material. He could foresee other new courses that would require more than just taking a syllabus and readapting it in new and interesting ways, but having to go to the library and putting together something from scratch. All faculty had done this in their careers and all of them knew how much time it could take. He thought there should be some recognition of that effort. He tried to come up with some pithy way of describing that in this document and could not. Therefore he would support the adding of "and courses" to this section. He suggested that the Provost, who was a member of the Columbus committee, be asked for his thinking on what the committee's intention was.

Provost Jamison said he thought Senator Oller had done an outstanding job of capturing the spirit of what the state workload committee had in mind. He commended the committee and said the product coincided very closely with the state and what each campus would do. It provided flexibility in its department base and provided rationale for wage and faculty activities. One of the tasks he felt the faculty members on the state committee played involved representatives from the Governor's office and from the legislature on the committee, who were educating all the people on the committee to the fact that a faculty member's life was much more than the limited amount of time spent in front of a class - that it included a whole range of activities. Regarding the particular amendment as to the design of courses, he thought all that was being done was writing in a provision that allowed negotiations with a dean. He did not find that particularly alarming. The dean might or might not decide whether a particular course was an extraordinary event that would require some load assignment. He did not find it restrictive.

Senator Griffin felt the Senators had somewhat of a mixed opinion about giving credit for new courses. For one thing, as a new course, did it have to be a new number? He said he had spent part of last year revising introductory laboratories and revisions based on over 2,000 papers that had been published in "Physics Education" to bring the laboratories to the state of the art. There was research there to back up what was done, and this was not a new course. This was the old course completely revised. Would he get credit for that under this load or not? It was not clear to him. On the other hand, he had colleagues who said they would not touch their courses or their labs, because it would take time away from their research. This might be a way to get them off dead center.

Senator Hariharan spoke in favor of the amendment on the following grounds: suppose a new faculty member came into the department and taught 9 hours in courses and all of them were brand new. As a result, there would be a real strain. This amendment was a provision for some rule so they could get released time to better establish themselves.

Senator Marquette said he had a question for Senator Oller on the amendment and its consequences. It should be kept in mind that this was motivated by the legislature's desire to get a 10% increase in undergraduate instruction. What was the effect of an amendment like this? Would this fit? If people were assigned time to develop a new course, did that fall under the 60-70% or the 70-80%? Would a loophole be created here? He was not sure exactly how this was being interpreted. Also, it appeared to him in these percentages that the intention was not to interpret them as Senator Ranson had, that everybody got to teach 60%. It was in fact departmental. He queried whether some people could end up with more, and Senator Oller replied it was the total teaching effort. Senator Marquette then asked how faculty would end up doing 10% more so the Board of Regents would not come back and make the University do it differently.

Senator Oller said that on the basis of the materials in the Regents Advisory Committee Report the option was given in an example of how this could be handled in a department. They said any faculty member could be given released time for the creation of a new course, so it obviously was something they thought possible. Then again he would go back to their statement, that if the total teaching effort fell into the range they were suggesting, the 10% would take care of itself. If people in Columbus came back and said these numbers did not jibe, the University could say it did exactly as it was instructed.

Provost Jamison said he would like to confirm that these were aggregate figures for a department, so Senator Marquette was right in stating it was a range of 60-70%. If the entire faculty was considered, the level had to increase 10%. So Senator Oller was also correct. If someone was given assigned time to create a course and someone else was teaching the course, it was an aggregated thing; it balanced. He heard nothing in the discussion in Columbus to indicate this was a possibility if something was being excluded, but rather to be determined on each campus. He thought that was what the Senate was doing now.

Senator Harris said she <sup>to the Chancellor of the Ohio Bd. of Regents</sup> loved the policy. Based on conversations in Columbus with the Faculty Advisory Committee, one of the concerns was the interpretation of the 10% and the different mind-sets that might be present in the legislature and the campuses. They were clearly not the same. The legislature indeed put a mandate that faculty would increase by 10%. The problem and the conflict concerned how the 10% was to be interpreted. Having dealt with the legislature previously, she thought the 10% meant numbers; that was, faculty would increase teaching toward undergraduate direction by 10%. They would not in her opinion give any consideration for research, university service, community service, etc., because in their minds faculty were being paid to teach; therefore, they wanted 10% more in the classroom. She tried to find the legislative history, and Ohio Revised Code started with section 100, so 84.14 confused her and she could not trace it. Provost Jamison said a portion of it was in the code and a portion of it was the temporary budget bill. Senator Harris said section 3345.45 was a new section that just went into the supplement of the code. There was no Ohio Revised Code Section 84.14. All of these were going to come to her committee, which would be reviewing some of them in May. But that was the one hang-up, the legislative intent. The Vice Chancellor said that the 10% would be lobbied around, leaving universities with flexibility. She said there was a misinterpretation in terms of what a faculty job was. She thought faculty needed to be on notice that the legislature might very well kick it back because of the 10%.



Senator Midha said he remembered the APCC also when he raised this issue there, and he agreed with Senator Harris. He approved of this policy but according to the newspapers, faculty were supposed to enhance teaching by 10% and this was based on 24 hours per year. The amendment was asking for released time for teaching, research and, on top of that, service also. There were departments on this campus where people were teaching 12 hours, and they were doing service on top of that. If they were going to do service and released time for research, where were the staff on this campus? There were not that many full-time faculty. He did not see how to answer that question and enhance teaching by 10%. This concern had been raised by his colleagues and he was speaking on their behalf.

Senator Ranson added he would support the Provost on this issue, that what was being claimed was only the right to be considered for credit for courses. The key words were, "load credit may be assigned", showing its discretionary nature, which made it fairly incumbent on those who wished it to apply for it. And the hypothesis of that, precisely how the legislature was going to treat particular documents coming down at this moment, was hypothesis. There were other lobbies that were working on the other side of the street, so to speak, with legislators. He did not feel this was going to cause a lot of trouble. Senator Ranson asked to comment on the remark of Senator Marquette, saying if 60% and 70% for a BA and a MA turns out in fact not to be enough to raise by 10%, the villain would of course be unmasked. It was the number of full-time equivalent students served and the number of full-time faculty returned to the classroom, which might or might not be possible to wriggle around or might or might not be desirable. But nothing in this amendment would put the University in dutch with anyone and he urged Senators to vote for it. Otherwise, something which might be possible could be lost, not to be reclaimed again.

The amendment carried overwhelmingly.

Senator Gigliotti asked Senator Oller where in the document graduate teaching was explicitly addressed. Senator Oller responded that the sections of the old policy relating to graduate teaching had been removed, on the basis that it would be up to the individual graduate departments to work out those policies in terms of the appropriate load hours to give graduate faculty.

Senator Gigliotti said he had read the document several times and did not see where there was any latitude for the department chair or any administrator in the graduate department to easily provide the appropriate load support for their faculty. It spoke only to course credit. There was a section on independent study, but it was the issue of support for the considerable amount of work that went into supervising graduate research, dissertations. Anybody here who had written a dissertation realized it was a lot of work. Many faculty and graduate programs would say sometimes in frustration, "give me a 3-credit course any time", and then the next day they would change their minds because they obviously enjoyed working with graduate students. But there was no recognition of that. His concern was that the discussion was about the load policy of The University of Akron and once this was passed it became the official document of the University and the basis upon which faculty loads were set. And it seemed to him there was a serious undermining of graduate education. Therefore, he proposed an amendment to section III, 1 on page 5, Teaching in General, to add a section E that said: "Faculty who participate on graduate thesis, dissertation and examination committees shall be assigned load credit consistent with the amount of activity. The load credit will be determined by the department head and dean after consultation with the faculty."

Seconded by Senator Newman.

Senator Clements said she was also on the APCC when this document was drafted and the Committee specifically did not do this because it essentially said, "Yes, we'll do undergraduate teaching except graduate teaching takes priority." Her impression was that this was exactly the type of message not to send. She thought these obligations could be covered without putting political tags on them. The whole idea was that faculty should be devoting more attention to undergraduate teaching. As a perception, she understood that faculty had shifted their attention over the last ten years or so from undergraduate teaching to graduate teaching. The issue was not that faculty did not work hard enough but that faculty did their work in the wrong place, or rather faculty put too much priority on graduate education. The documents that came along with these instructions did not say faculty were not working hard enough but that faculty were doing what the legislators wanted them to do; faculty were not teaching the voters' children and were devoting too much time to graduate students. That thinking motivated the committee to write this in such a way that it tried to skirt that issue. "We will teach undergraduates but we want to keep doing things the way we're doing them." That was not the message to send. That was the thinking behind eliminating some language that had been in the workload policy of 1979, granting load credit for directing dissertations. By the way, under the existing load policy which theoretically had been operating since 1979, this was the only grounds upon which people were to be granted load credit for graduate instruction, if they were directing dissertations.

Senator Aupperle stated if the amendment that Senator Gigliotti had proposed was not adopted, Ph.D. programs on this campus would be destroyed. As to the fear that the wrong message would be sent, he did not think this would exist. When one took a look at Item 1, Teaching in General, one found that actually what was being proposed in this policy statement or policy guidelines, was a quiet revolution that was taking place in this document. Even in programs with Ph.D.'s, the emphasis was going to be 50-60% on teaching. That was fairly dramatic when one looked at A, B and C and saw the emphasis on undergraduate teaching. He did not think in Columbus where they see these percentages broken down that the University had endorsed them consistent with what the state expected. There would be no chance they would reject it. The rejection came closer based on the arguments of Dr. Harris and Dr. Midha regarding being able to implement this document, rather than on the fear that the University was moving too close to Ph.D. programs. He thought Senator Gigliotti was making a good point. If one sat on a dissertation, whether chairing it or not, one devoted an extensive amount of time. There would not be a sense of wanting to participate if the effort would not be respected. He said his second observation went further. While he supported the Senator's motion or amendment, it was important that the implications of the document be understood. The policy statement would have to be translated into an evaluation process. Clearly, most would find that the 40-40-20 rule that had generally applied within universities would come to an end and most of an evaluation would focus on teaching, not on research. And as a reminder, teaching was far more difficult to assess than research publications and the quality thereof.

Senator Oller said he wanted to speak to something Senator Aupperle said, and that was this business of 30-40-30 no longer being operative. The whole point of this approach was that it would change from semester to semester. Certain people might wind up in situations where they taught the lion's share of the courses in their programs year in, year out, because other people had Ph.D. students and got released time. Some semesters those people would have to teach more and some semesters the people who had 60 or 70% of their workload in teaching would be allowed extra load credit for research, credit for doing service. These were supposed to be flexible to change from

semester to semester. That was the whole point of this policy so that everyone did a bit more teaching.

Senator Newman noted it seemed that Dr. Gigliotti's amendment spoke to that issue also. There was nothing in his amendment that said the policy could not be flexible, and he believed the amendment improved the flexibility of that by recognizing that flexibility should include graduate efforts, so he supported the motion. He thought the amendment was necessary to give a message to Columbus that undergraduate education was supported but graduate education was still recognized also.

Senator Cheung said he agreed with Senator Gigliotti in that credit was needed for involvement with graduate students which was very, very time-consuming. But he was concerned that something was being added here and that was credit for serving on a committee. Credit for serving as a dissertation advisor he understood, though measuring it could be difficult. As for serving on a committee, he viewed that as a professional commitment. He was a member of the graduate faculty and serving on committees was one of the things he agreed implicitly to do as a member of the graduate faculty. He feared that creating credit for the committee members was probably overstepping what we did now and maybe would raise a red flag, although he would certainly support some recognition on these lines for people who were involved in the direction of a dissertation or a thesis.

Senator Hariharan noted as Senator Clements had indicated, undergraduate education was to be stressed.

Senator Gigliotti said he very much appreciated and respected the approach Senator Clements was taking to the sensitive issue. And he supposed he would be willing to withdraw the amendment if he felt that Ohio State University's document did not include a reference to load for graduate teaching. He suspected it did. He was fearful that while addressing the sensitivity, the Senate might be inadvertently entrapping the faculty in a document they must live with and it would not work, not in the graduate program. Addressing Senator Cheung's good comments, he specifically tried to word the document so credit would be given for committee members, but only if it was a situation where they truly were having a major input into the product. He said that could be seen oftentimes, for example, in his department, when new faculty wanted to learn the process of correcting theses and dissertations and they worked with someone who had been around for a while. It was still a lot of work but they were not chairing a committee and they were learning. He thinks also that one of the benefits of the amendment was that it eliminated what had been on the books for years and years, and that was the automatic 3-credits of doctoral research activity just by virtue of working with graduate students. A person could get credit while working with one student, or while working with six students. This really did provide a lot more flexibility for the dean and the faculty member.

Senator Green said it seemed to him that just a moment ago an amendment was passed adding the words "and courses" in an attempt to be flexible. As Senator Ranson had pointed out, all that amendment did was give the department head and dean the opportunity to take into account the development of special courses. It seemed to him that Senator Gigliotti's amendment, if appropriately altered, would do the same thing. He thought the operative phrase was, "shall be". He wondered if Senator Gigliotti would accept a friendly amendment to change that to, "may be"; in

other words, allowing deans and department heads the opportunity to grant a flexible schedule to someone who was doing a lot of graduate work. Accepted by Senator Gigliotti.

At the request of Chairman Gerlach, Secretary Brink read the motion: "Section E. Faculty who participate on graduate thesis, dissertation and examination committees may be assigned load credit consistent with the amount of activity. The load credit will be determined by the department head and dean after consultation with the faculty."

President Elliott commented that Ohio State fought very hard for 40-40-20 and lost. Having heard this debate, she wondered if the issue that Senator Clements raised could be avoided by simply saying something to the effect, and she noted she was not making a motion, that flexibility was required for faculty who worked on an individual basis with advanced students. That did not raise a red flag. Yet flexibility and assigned load would be required or some language to that effect. So that in this document commitment to a dissertation student had been affirmed, but a red flag was not raised in the process.

Senator Kimmell <sup>said</sup> offered that the amendment was unnecessary. On page 3, it said the unit had to have 50-60% of its total workload devoted to teaching. That meant the other 40-50% should be devoted to research/creative activity, service and other professional responsibilities which further the goals of the department and the university. It seemed to him the important phrase here was, "other professional responsibilities which further the goals of the department." The unit administrator and the person above that had the option to decide what those other responsibilities were and how much load credit to give to them. He really did not think it was necessary to include an explicit statement about workload for advising theses and dissertations. But if the body thought it was not political suicide to do that, he did not know it added any more to the document. It was already taken care of.

Senator Perry said he would most vigorously support an amendment to the tune of what Dr. Gigliotti had proposed. He had supervised a number of graduate students and also undergraduate students doing advanced work for baccalaureate degrees. This work was extremely time-consuming. In fact, it was the best part of the program for undergraduate specialists as well as for graduate students. Some recognition of individual instruction for advanced students, whether it be in Dr. Elliott's terms or in Dr. Gigliotti's terms, was needed. This document needed to reflect the reality of what faculty did in their lives and to allow the provision for suitable amounts of teaching credit for what really was a teaching activity separate from research.

Senator Marquette said it appears to him that the problem might be solved if Senator Gigliotti would accept a substitute amendment. On page 6 under Individual Research or Study, insert the concern there so that it read: "Faculty who teach students who register for independent or individual study, thesis or dissertation research or reading courses may be..." From there one could get the credit and negotiate it appropriately with the workload. He thought that would be in furtherance of both concerns.

Chairman Gerlach suggested that Senator Gigliotti ask unanimous consent to withdraw his motion so that Senator Marquette's motion could be voted on. Senator Gigliotti withdrew his amendment, and there were no objections.

Chairman Gerlach clarified that Senator Marquette had made a motion, seconded by Senator Oller, to insert on page 6 under Load Credit in Special Situations, no. 1, the words, "thesis or dissertation research" following the words "individual study" in the first line.

Senator Cheung said he did not regard directing a Ph.D. student or a masters student as a special situation. It was something he did daily, in the halls, in his office, in his laboratory, today at lunch. He wondered if perhaps item 1 could be moved to be item E under Teaching in General rather than under Load Credit in Special Situations. It was hardly a special situation for those involved in graduate study. Senator Newman seconded.

Senator Ranson suggested there might be a simpler way of doing it. The heading could be changed to "Special Load Credit Situations" and keep the statement in exactly the same place. He thought that would take care of it.

Chairman Gerlach asked if all Senators were clear on the idea of moving this item with the words "thesis or dissertation research" duly inserted from page 6 back to page 5, lettering it "E", and renumbering the items on page 6.

Senator Focht asked if the heading which was underlined and in caps in bold went with it, because that was not parallel anymore with any of the other items that were there. Chairman Gerlach replied no; the heading was not needed.

Senator Richards said she had a comment about parallel structure and hoped she was not opening up a can of worms. The way the document was established, Polymer Science was under Special Cases on Page 4, so the document paralleled load credit in special situations.

Senator Oller thought "special" referred to two different things. In the first instance "special" meant units that did not fit into those categories of specified ranges. "Special" in the other case came from the old document and just referred to special situations that were different from a normal teaching situation.

The motion to move item 1 from page 6 to page 5 as item E under III, 1, and to renumber the items on page 6 carried without dissent.

Senator Guegold moved that on page 5, 2, A, a ninth category, "accreditation standards", be added. Seconded by Senator Edwards.

Senator Perry said his college dean mentioned that some of the units received administrative load based on the requirements of the accrediting agency's recommendations in those departments. Therefore, when those were listed as a possibility for consideration . . . Chairman Gerlach replied that the legislature of the sovereign state of Ohio would not like this.

Senator Harris thought this should be changed. Accrediting bodies made requirements. So "standards" should be changed to "requirements."

Senator Perry asked what accreditation had to do with administration. How did that affect the workload administrative activity? Senator Harris said there were accrediting bodies who would

not give credit to a program unless there were "x" number of people and "x" number of persons who were supervising that program full-time.

President Elliott suggested that administrative work was covered in a variety of ways under the "shall's" and "will's". This was a much debated topic in the halls of government today to the point that there were a number of suggestions that the Federal Office of Education eliminate all the accrediting bodies and take it over. She thought the Senate would be ill-advised to mention it. It was a very sensitive area and she was comfortable that it was covered in the rest of the document. If the Senate thought not, it certainly should be given more consideration, but it raised an issue that she would prefer not to raise.

Senator Oller said there were eight of these categories which could be used and one could find as many characteristics as needed to come up with the number of credit hours that an accrediting agency expected. He suggested leaving it as it was and not putting anything in that was going to cause difficulty.

The amendment to add the words, "accreditation requirements" failed.

Senator Gigliotti had a question for Senator Oller or the committee members. On page 7, point no. 4, it said that load for a course could not be assigned both to a graduate assistant and to a faculty member. Could that be explained and could someone tell him whether that meant a faculty member could not have a graduate assistant work in a lab? Senator Oller said this came directly from the old policy. It was saying if a graduate student was doing the work, a faculty member could not claim load credit for it.

Senator Gigliotti said that as a department head he thought if the load activity of all people who worked in the department, and that would include graduate assistants, had to be reported, that would mean graduate students could not be assigned to work in labs and assist the faculty when they were really just assisting.

Chairman Gerlach said the way the Chair understood it was, as the faculty member taught a 4-credit hour course, three hours was his responsibility in lecture every week and the fourth was the discussion session run by a teaching assistant, that the Chair did not get credit for that one hour out of the four. He got no credit whatsoever for supervising the graduate assistant, visiting the classes, or anything else.

Senator Gigliotti said since the faculty had been working under this policy for 15 years, he withdrew his concern.

Senator Marquette felt Senator Gigliotti was withdrawing his concern prematurely. One of the reasons for the 10% workload requirement was ~~because~~<sup>that</sup> the faculty activity reports that were sent to Columbus for the last 15 years were wrong. They were wrong repeatedly throughout the universities of the state. Faculty did not bother with them half the time. The department head would fill some of them in. Someone else would fill some of them in. They all went down to Columbus and the 10% they were working off was a result of the fact that those faculty activity reports did not accurately reflect what faculty were doing. He was not sure exactly what to do here, but he did not think the Senate ought to take a cavalier attitude toward it because faculty were going to start filling out those forms again based on the interpretation of this section. He was concerned

when he read this report that this might in fact be the case. The subject was a 10% increase. If this section proceeded as it was right now, there would be some departments, if they "behaved properly" in terms of reporting, who would show a decrease in faculty load. If a 4-credit course with a 1-credit lab had been reported and all 4 credits were given to the faculty member, and then all of a sudden 3 credits were given to the faculty member and according to the guidelines from the state each GA got an hour load credit for the discussion section, there could be some very strange reporting outcomes. He was not sure exactly how to handle this but he did not think the Senate ought to glide over it either.

Senator Green thought Senator Marquette had made a very important point. One of the things that bothered the legislators was that there was much less contact between senior faculty and undergraduates. At a university like this, routine contact between senior faculty and undergraduates could occur in the large lecture sections. Now that was not perhaps ideal by some people's estimation, but it was one place where entering freshmen, for instance, could be taught by a full professor. It was the availability of graduate assistants that made that possible. It seemed to him that one thing universities in general needed to do was explain that fact of life to the legislators. If faculty were not careful, they were going to undermine something already being done that they want us to do, which was to have undergraduates, particularly freshmen, making contact with faculty. He did not know how to solve the language either, but it should be taken into account.

Senator Oller said he did not quite understand what the problem was. Chairman Gerlach gave a very good example. He had a 4-credit course in which he was responsible for teaching 3, conducting the lectures, and the grad student, the discussion group. He got 3 credits, the grad student got 1. That seemed to be a fair arrangement because he should not get full credit when he was not doing all the work. That was all this was saying, that a faculty member could not double-dip. If the faculty was not doing the work, the grad student got the credit load hours.

The Senate granted permission to Chris Steiner, a member of ASG, to speak. Mr. Steiner suggested a change of wording. Instead of dealing with the graduate student in the second sentence, perhaps the sentence could deal with the professor and say something to the effect of, "A professor who does not actually teach the course or is not the professor of record may not get credit for that hour." Therefore, the graduate assistant would get credit instead.

Senator Marquette said the issue was not with the current wording. The problem was the way it had been inappropriately applied in many cases. What was being sent to Columbus in the faculty activity report had not been reported accurately. Somehow it had to be made clear that this really was the intention, that faculty could not double-dip. Maybe wording to that effect was needed.

Senator Harris asked if the situation would ultimately fall under either special circumstances, Instructional Support, no. 4 on page 6 or in the alternative, no. 3 on page 6, because there would be some supervision of that graduate student. She queried whether that would take up the hour in question and also validate the faculty activity load.

Senator Ranson said that in the interest of expediting a vote, he would say he concurred with Senator Marquette. What was being talked about was a unified coding procedure whereby all departments reported on an equal and comparative basis. There needed to be something arranged at

a subsequent date. He thought it would be very difficult to arrive at in terms of a language compromise at this time, and he suggested that Senate address other issues.

Senator Perry said what no. 4 was trying to do was guarantee proper accounting of activity. Such proper accounting was necessary and applied in any reasonable document and procedure, and so therefore he believed it was like having a rule stating accountants must add correctly. There was no such rule, right? He moved that item 4 be simply deleted and the subsequent items be renumbered appropriately. It was not necessary to save the rule. Seconded by Senator Green.

Senator Oller said it was very necessary to say it, because it was quite obvious people had been doing exactly the opposite. People had been getting credit for work that graduate students had been doing. That was the point of why it should be here. It was telling people to add correctly because they had not been adding correctly in the past.

Senator Gigliotti said he agreed completely with the spirit of point no. 4 and he thought it should be left in. He suggested that the word be sent to all departments stating if they had a lab, that lab ought to be worth one credit and be assigned to a graduate student.

Senator Glaser moved the previous question. Seconded by Senator Edwards. Motion to end debate carried.

The amendment to delete item no. 4 was defeated.

Senator Perry said item no. 4 still caused a problem. In the Chemistry Department, faculty teach hundreds, sometimes thousands of undergraduates in labs and it was all called a 1-credit lab. There were teaching assistants who regulated many of these sections, and there were faculty members who supervised those teaching assistants. There was a great deal of activity involved and it seemed as though only one person might get credit for this. The numbers did not add up if this no. 4 was followed in a direct way. Chemistry had advanced labs which were taught not only by a faculty member but graduate assistants at the same time, also in the lab. How could one divide one section credit for a lab course when there were two teaching assistants and a faculty member simultaneously present in the lab? Did each one get a third of a credit hour? That did not make sense. There was indeed a problem with no. 4 which had not been addressed. He would be happy, if it could not be eliminated, to amend it in a suitable way so as not to cause a problem.

Chairman Gerlach observed it would be very helpful for the expedition of business if Senators did not simply stand up and discuss matters in general without a specific motion to do something. He asked if anyone had a particular motion to offer by way of amendment or other kinds of alteration of this document.

Senator Ranson moved to cut off further discussion of this item 4 because the Senate had just voted not to deal with it any more.

Senator Green moved to amend item 4 so that perhaps Senator Perry's concerns could be allayed. He moved to add a sentence at the end of the current document, item no. 4, that read: "Faculty supervision of graduate students may be assigned load credit under unusual circumstances." There was no second.



President Elliott said that because of the special needs of labs, under I. D, (page 5), "When a class substantially exceeds the maximum size for which it is programmed...", perhaps the clause, "...or is a laboratory setting which requires special assistance," could be added. Sixty undergraduates could not be in a chemistry lab without some assistance. She asked if that clause would address the problem, but noted that she could not make such a motion.

Senator Newman so moved. Seconded by Senator Perry. Chairman Gerlach clarified that the motion was to add the clause suggested by the President, so that item I. D on page 5 would read: "When a class substantially exceeds the maximum size for which it is programmed, or is a laboratory which requires close supervision, the class may be split or the faculty member may be...etc."

Senator Kimmell spoke against the motion. On page 6, under Load Credit in Special Situations, Other Special Situations, it said some activities which included the item of supervision did not lend themselves to standard University-wide policies. Load credit for such activities was determined in accordance with guidelines established by the department head and the dean of the college after consultation with the faculty members involved. He thought that would clarify the situation.

Senator Oller said he would support that. He also pointed out by adding what was suggested for section D would be to misconstrue the intent of section D which was to deal with class overloads. It would bring two issues into one section of the document.

Senator Newman said he would like to withdraw his amendment. The Senate granted its unanimous consent.

Senator Oller called the question on the entire document. Seconded by Senator Clinefelter. Motion to end the debate carried.

The motion to approve the policy statement carried without dissent. (Appendix A)

Senator Weber pointed out that on page 7 under no. 2 in Procedural Guidelines, there was a "t" left out of "the" Spring Semester.

Senator Marquette said in keeping with the President's announcement of the action by the Board of Trustees, department "head" should be changed to department "chair" throughout.

**B. Bylaw Amendments** - Senator Clinefelter moved that Bylaw VII, B, 3 be amended by inserting the following: "The retired faculty shall elect one representative from nominations made by them to the Executive Committee, which shall conduct the election. The names of the nominees shall be submitted to the retired faculty by mail ballot for election." Seconded by Senator Oller.

Senator Clinefelter said this proposal would restore a representation that the retired faculty used to have in the University Council. They were the only faculty body that lost their representation in the transfer to the Faculty Senate. When the question of their representation came up in the Adhoc Committee on University Governance, a majority of the members thought representation for the retired faculty was unnecessary because their concerns would not be the same

as the rest of the faculty. This was true in many respects, but not entirely. This year the faculty spent time on emeriti concerns; for example, the availability of computer time. It seemed appropriate that the retired faculty have someone of their number here to speak on their behalf. They were the collective memory of the faculty. This was important when the Senate discussed the origins and developments of various practices and policies. Retired faculty were largely an untapped resource. Many opted to continue teaching, research and publication, and conference attendance. This benefitted the University as well as themselves. A representative from this group on the Faculty Senate seemed to her to be entirely reasonable and appropriate. As this decade advanced, there would be a larger group of retired faculty because of the ERIP programs. People had already voiced concerns to her about the availability of office space and some of the things which the University provided for them when possible in the Faculty Manual under the "Benefits for Retired Faculty" statement. Senator Clinefelter felt a retired faculty member ought to be here to speak to their own concerns as well as the history of any legislation.

Senator Erickson spoke in agreement with Senator Clinefelter. She said she was on Committee E of AAUP with Emile Grunberg, an emeritus professor of considerable note on this campus. He exemplified emeriti and retired faculty. This was somebody who considered that retiring did not mean he would not be doing research or he would not be helping if he was needed to be available to teach. However, he would not want to put his input into committees. In 1979 he brought this issue plus what was then known as a bill of rights for retired faculty to University Council. It was in fact Senator Stuyvesant who introduced that motion in 1979 pointing out there were indeed issues that retired faculty had that were not met and would not even be considered by other faculty. The original motion that was in the Faculty Manual was non-voting, but in 1986 University Council changed that to a voting representative. She thought this was very valid, especially now that there were faculty who did indeed have all kinds of concerns. It should be noted that this campus was the start of Committee E for retired faculty. And that became a national committee of AAUP. Retired faculty nationwide recognized they had needs and needed representation. She thought, for example, office space where available, parking, access to the computer center, supporting their institution through research, all different kinds of equivalent library privileges, attendance at lectures, opportunity for consulting activity in departmental and campus-wide committees, were a whole series of issues. They indeed should have a voice in the Faculty Senate.

Senator Marquette rose to oppose this amendment. He said the University was operating in a very different environment than it was a number of years ago. Emile Grunberg was a distinguished older colleague who was compelled to leave; he was a given age and he had to go. Faculty did not have to go anymore. Faculty were no longer in an environment where the colleagues who left were doing so involuntarily. The colleagues who were leaving now had voluntarily separated themselves from the responsibilities of the institution. They had said, as in fact Bruce Holland so eloquently stated, they had gleefully chosen to take ERIP. This was rather like wanting to immigrate from Britain to the United States and still be able to vote in parliamentary elections. He thought the image of the older colleague that added to the balance of the Senate, that added to the balance of the institution, was erroneous in an environment that had been so radically altered. If they stayed, they would have the same responsibilities active faculty did and the same rights. But if they voluntarily chose to leave, he was not sure. If they were leaving active faculty with the responsibilities, he did not think the Senate needed to concern itself with those kinds of issues in terms of representation. He had asked the last council representative of the retired faculty, George Knepper, what he thought of being a retired faculty member on the Senate and Dr. Knepper

said he felt as if he were, "the dead hand of the past." He had no idea why he was there; he had been appointed, and he was the retired faculty's representative. But in truth, the kinds of concerns that were being expressed here were more the kinds of concerns for a shared governance relationship and not for the Senate. They had no responsibilities any more. A few days ago there was a big discussion about denying the students the right to sit on the Senate. They came here voluntarily; they were accepting one set of responsibilities as part of a relationship between instructors and then students, and yet there was some attempt to remove the students from the Senate. Now this amendment was trying to keep people who had voluntarily left, and that was going to be the norm henceforth, people were leaving because they felt like it, not because there were respected elder colleagues who were cut off in their prime - people were choosing to leave. This was a very different environment and it was inappropriate to add somebody back to the Senate.

Senator Moss submitted if there was going to be special representation from the retired faculty, there should be the same for non-tenured faculty. While the contributions of the retired faculty were appreciated, if faculty were to be looked upon as separate entities in this way, perhaps non-tenured people should have the same type of representation.

Senator Patton said in the college of nursing she had received more responses on this particular issue than any other issue that had come before Senate this year. She wanted to read a comment that was sent to her that basically summarized the comments of other colleagues in the college of nursing: "We are in opposition to the proposed amendment. Along with rights come certain responsibilities. Faculty having representation on the Faculty Senate have certain responsibilities their retired colleagues do not share. Retired faculty do not have the responsibilities regular faculty have to the University community. They are not responsible for continuing to teach, produce scholarly or creative work or be of service to the community. While it is true that many retired faculty pursue these activities, it is not a part of their responsibilities. We do not believe then that they should have the right of Faculty Senate representation and have voice in vote in setting parameters for faculty who maintain those responsibilities."

Senator Aupperle said he, too, thought the environment had changed, as Dr. Marquette pointed out. But the question was whether the environment had changed to facilitate a desire to keep retired faculty from having a voice. He would support the amendment to include retired faculty having a voice for a variety of reasons. In the business community today one of the hottest topics was stakeholder theory. In the stakeholder theory, boards of directors and corporations were having to reach out to stakeholder groups that in the past had actually been ignored. Retired faculty were an important stakeholder group to this University and to ignore them simply because they had the ability to choose to retire was a mistake. This "choice" also needed to be clarified. Some faculty might choose to retire simply because of the fact that their spouses had urged them to back off some of their activities. That was not to suggest that such individuals had chosen to no longer provide a duty to this University. They would still have a profound interest in performing many other duties, but what many forgot was when one retired this was frequently viewed by researchers as the most dramatic and traumatic point in one's life. For this body to simply say it was going to facilitate that trauma seemed to be cold-hearted in an environment where, as a University, diversity and stakeholders were embraced. It was not in the University's best interests.

Senator Ranson supported what Senator Aupperle said, thought he was exactly right, and that he stated his opinion very eloquently.

Senator Griffin said this proposal would only add one person to the Senate for representation. It did not give retired faculty the right to take over control of the Senate, and he would certainly support this. He knew some faculty chose to retire not because they did not want to work but because they did not want to continue work for simply no money. They could retire and make nearly the same salary. They should have some representation here even though it would be minuscule. At least it was a voice, not a real vote.

Senator Webb had a question about the actual amendment and the process - it did not make sense to her. If retired faculty elected one representative and gave that to the Executive Committee to conduct an election, what would it be an election of? There would only be one representative. She did not think that the process was clear. Senator Clinefelter replied the one representative would be elected from the list of retired faculty who were willing to serve and someone elected ought to want to be here. Senator Webb asked if they were only going to be voting for one person, and Senator Clinefelter said the group would be voting for just one representative. Senator Webb inquired whether it would either be that person or nobody, they would vote for. Senator Clinefelter said there would be a group of those who agreed to run and the representative would be elected from those who were willing to run.

Chairman Gerlach recalled when this was run by the Executive Committee, it was noted that the reason the Executive Committee acted as the convenient vehicle for conducting the election was because other elections to this body were handled by the various units, the deans of the colleges, for example. The idea was that someone had to be designated to run the machinery and the Executive Committee could possibly handle it better than another unit.

President Elliott noted that as of this year there would be over 300 living retirees, which would be a significant election. The Alumni Association could routinely contact them through quarterly magazine. Maybe this would be a vehicle that would not make it an onerous burden. Yet she acknowledged that updating those addresses was pretty tough. She was not suggesting an amendment but just that this was the regular contact point. In the last body, they made nominations directly to the President.

Senator Webb admitted it might be just her confusion, but it seemed they should have more than one person to vote for. Chairman Gerlach directed the Senator to the Bylaws of the Senate where there was a section on elections. It was assumed that the Executive Committee would follow that election procedure.

Senator Erickson said she had a question for Senator Marquette. She considered that people who retired from this campus were a big range of people. She understood that there might be some who were legally taking early retirement and planned to disappear into the wide-blue yonder, but there were many others, people who were just getting older and were just not wanting nor capable of handling their teaching responsibilities, yet they still wanted to continue doing things associated with this University and that was very reasonable. It might be illness, age, whatever. But this situation of early retirement suddenly changed the whole situation of 300 newly retired faculty. There were people who were not necessarily going to be interested, but there would be those who were and she voted to give them, as Senator Griffin pointed out, a tiny, minuscule vote on the Faculty Senate.

Senator Newman thought that a potential major resource might be lost by not considering retirees. There was nothing to lose and a great deal to gain by having this extra input. He had been associated with the Institute for Life-Span Development and Gerontology since its inception, and there were all kinds of data indicating this type of input was extremely valuable.

Senator Marquette said retiree exclusion was not merely a matter of being cold-hearted, but was thoroughly discussed at the Adhoc Governance Committee and was passed by Council when the composition of the Senate was determined. The question was not just about the retirees per se; it was a question of community of interest and who got representation. The Committee fought very, very hard to get a Faculty Senate that was going to have predominately faculty membership with a full community of interest and a limited number of representatives from several other groups. Then the shared governance council was created to provide access for those kinds of interests. It was not Senator Marquette's intention to sound as though he was being nasty to a bunch of old folks. What was being discussed was a principle concerning the extended community of interest required. If Senate allowed this, there were lots of other groups on campus who would say they had as much interest in what went on as the retired faculty did, and they would come before the Senate and request one seat, and then a little while later someone else would come forward and say they were a different group and ask for another seat. The question for Senate to establish was the definition for community of interest. He sympathized with a lot of his retired colleagues. He understood some of them still had an interest in being partially active, partially doing research, etc. But they did not have the same responsibilities regular faculty had and they did not have the same community of interest regular faculty had. If the principle was established that somebody was entitled to representation on the Senate because of a partial community of interest, University Council would exist again. This was decided by the Adhoc Committee and it was decided by Council as a matter of principle. The Committee fought long and hard about how many Senators would serve. Attention had to be paid to the issue of community of interest or another University Council would be created.

Chairman Gerlach observed at the time University Council perused the Faculty Senate program, to the best of his recollection the issue of a retired member on the new body was never considered by Council, it was simply left out.

Senator Oller confirmed the Chairman's recollection that it was never brought to the body at the time when the makeup of the Faculty Senate was being discussed. So the issue was never really thoroughly discussed in Council.

Senator Gigliotti asked if this motion was defeated, whether or not an emeritus could come before this body when an issue of concern was being discussed. Senator Marquette responded that they certainly could.

Senator Perry offered a different viewpoint on the idea of community of interest. One idea was the question of a retiree being a member of the University community and sharing the common interests with the rest. In some ways, the Senate might want to get the retired faculty and perhaps some who were just over retirement involved, but there might be many people who lived to be 85, 90 years old, people who spent a good number of years in nursing homes and retired in Arizona; there might be a great fraction of those retirees who never talk to each other, let alone come near the campus, so it could be an unworkable situation. If there was a defined group of partially-active

retirees that could be identified, that would be one argument. But the larger group, many of whom might never come near the campus again, was another story.

Senator Aupperle noted that Senator Marquette made reference to shared governance, but that particular committee was about to dissolve itself. Most of them did not believe they had a real purpose in life. He suspected that would fall by the wayside very soon. The point here was there was a community of interest that might be vaguely defined, but the fact remained that there were going to be retired members of the University body that would have a committed interest in participating in activities, and they would have, as Dr. Newman pointed out through his studies in gerontology, so much more to offer than the expense involved. How could the Senate choose to do something that simply disregarded the concerns of these individuals who had contributed so much in the past? He had colleagues who retired 10 years ago in name, but in reality were still on the job.

Senator Webb asked if it was the proposer's intention to state if a retired faculty member were admitted to this body that this Senator would then be eligible to serve as an officer of this body? Senator Marquette stated yes, it could happen.

Senator Green said he had also had received a great deal of comments from the people he represented, and they were uniformly hostile. It was interesting that Senator Aupperle mentioned the stakeholder theory because three or four times he heard that theory used against this amendment arguing that retired faculty did not have a stake in the University and should not be represented. It seemed to him the only cogent argument for representing retired faculty was the community of memory, that there were people who knew things many Senators did not know and who would bring an institutional history to the body. His colleagues were very hostile to the notion of giving privileges without duties, of giving rights without responsibility. They pointed out to him there was a policy for emeritus faculty that secured certain benefits to retired faculty in recognition for their past service but not requiring anything of them in the present or in the future. He found himself on the horns of a dilemma. His constituents did not want this passed, yet he could see some good arguments in favor of having some kind of institutional memory. So he wanted to offer a substitute amendment for this proposal which would read: "At the beginning of each academic year the President of the University shall appoint a Senator from among emeritus faculty." The reason for emeritus faculty was that the body passed a policy not long ago establishing certain provisions for appointing emeritus faculty. Clearly, if any among the retirees had a community of interest, it was those people who had passed those hurdles. The virtue of this amendment was that it would grant at least some representation to this group and give the potential for institutional memory. It also would allow for the appointment of a Senator who had an interest in continuing with this body. Seconded by Senator Buie.

Chairman Gerlach said this put the body on the horns of a dilemma. The question was, did the body want to accept this substitute for the original proposal? The Chair thought if the body wanted to accept the substitute amendment, it would have to lay over 30 days according to the bylaws. The Chairman held that amendments had to be placed on the agenda as a substitute motion, but then had to lay over for 30 days before they were voted on.

Senator Newman said he had two points. One, it was possible to make that as a friendly amendment and eliminate the problem. Second, instead of being appointed, could that person be elected by the Executive Committee - same motion, same emeritus, instead of appointed, elected by the Executive Committee of an emeritus faculty member?

Senator Green said he would not have a problem with offering his amendment as a friendly amendment to Senator's Clinefelter's amendment. But he thought the appointment process was very important here, because that process assured that retired faculty would be actively represented and would add invaluable input to this body. From his point of view, the appointment process on the part of someone outside of this body was an important element to the amendment.

Senator Ranson spoke against the substitute motion. When Professor Green said members of his college were very much in support of what he was proposing as a substitute, he thought the Senator must have meant the members of his division in the college. In his division, there was no such motion to deny people who had sound records, retired faculty or emeritus faculty, any of those kinds of privileges which were traditional. He would add that it had been a tradition of the AAUP to make considerable ongoing and active use of retired faculty, not only because of collective memory but because many of these people were entirely active. And he did not share Senator Marquette's view that people necessarily retired for reasons which were less than sensible. He pointed out that retirement, for instance, was an invitation from the University to go, not simply a choice by the faculty member to go. So he would speak very strongly against the substitute and urge that the original motion be voted on and the substitute motion put down.

Senator Richards said the word that scared her in the substitute motion was "appointment." Any trouble with the University Council and the growth and expansion of University Council was because of appointments. Every member of this Senate was now an elected member with official elective voice. She thought if a professor emeriti <sup>were</sup> was to be added to the Faculty Senate, they should be elected to it.

Senator Patton asked if this was an open-ended meeting to go on until business was finished. Chairman Gerlach replied that no meeting was ever open-ended. A motion to adjourn could be made at any time.

Senator Newman moved the question. Seconded by Senator Sterling. Motion carried.

The substitute motion made by Senator Green was defeated.

Senator Green moved the question. Seconded by a multitude of voices. Motion carried.

The motion to amend the bylaws to add a retired faculty member was defeated, 17 yes, 20 no.

**ITEM NUMBER 2 - ADJOURNMENT** - Senator Green moved to adjourn. Seconded by Senator Oller. Chairman Gerlach noted that the rest of the business would be added to the agenda for the next meeting. Motion carried and the meeting was adjourned at 5:20 p.m.

Respectfully Submitted by  
David R. Brink, Secretary

## **POLICIES AND PROCEDURES REGARDING FACULTY WORKLOAD**

### **History/Rationale:**

#### **I. Faculty Workload Legislative Mandates**

In July, 1993, the Ohio Board of Regents' recommendations on faculty workload were given the legal authority in Amended Substitute House Bill 152 to work with State Universities and Colleges to review and establish policy guidelines with regard to faculty workload.

Section 3345.45 required the Board to develop jointly with the state universities by January 1, 1994, standards for instructional workloads for full-time and part-time faculty. These standards were to be in keeping with the universities' missions and had to emphasize the undergraduate learning experience. The standards were to contain clear guidelines for institutions to determine a range of acceptable undergraduate teaching by faculty.

On or before June 30, 1994, the Board of Trustees of each university must take formal action to adopt a faculty workload policy consistent with the statewide standards adopted by the Board of Regents.

Section 84.14 requires the Board of Regents to work with the universities to insure that no later than the fall term 1994, a minimum 10% increase in statewide undergraduate teaching activity be achieved to restore the reductions experienced over the past decade. These recommendations later found voice in legislative mandates to identify and implement guidelines for faculty workload.

Section 3345.35 specifies that the workload policy adopted by a Board of Trustees prevails over any conflicting provisions of any collective bargaining agreement.

#### **II. Proposal for Faculty Workload Policy**

The final report of the Twenty-First Century Task Force establishes the current University mission:

##### **Mission Statement**

The University of Akron, a publicly assisted urban institution, strives to develop enlightened members of society. It offers comprehensive programs of instruction from associate through doctoral levels, pursues a vigorous agenda of research/creative activity in the arts, sciences, and professions, and provides service to the community. The University pursues excellence in undergraduate and graduate education, and distinction in selected areas of graduate instruction, inquiry, and creative activity.

We are asked to establish policy and procedures regarding faculty workload in compliance with the Ohio Board of Regents, State Law, and The University of Akron Mission's Statement.



The existing policy for The University of Akron was established in May and October of 1976 and slightly modified in September of 1979. Within the established policy we recognize the following:

Individual faculty loads are determined initially by the department or division chair:

1. In consultation with the faculty member;
2. In accordance with established and well-recognized professional relationships;
3. In harmony with criteria concerning workload of recognized programmatic accrediting associations of which a school or college is a member or an applicant for membership; and
4. With final approval by the dean of the college.

In establishing the University Workload Policy, we need to define the range and general expectations regarding faculty teaching, scholarship and research/creative activity, and service responsibilities in terms of our academic mission. Special attention should be paid to the role that undergraduate instruction plays in the mission and expectations of the institution. And, we must stipulate how each college and department, or equivalent academic unit, should develop a workload policy consistent with our university.

Therefore, the workload policy and goals inter-react on three levels, University, college, and department. There will need to be some oversight between the Provost, Deans, Department Chairs, Directors, etc.

The academic department is seen as the key to achieving a reemphasis on undergraduate teaching by faculty.

To comply with the Ohio Board of Regents, the University must have an established policy in place by May, 1994, so the policy can be taken to the Board of Trustees by the President for timely approval.

Departments and individual units are to have their policies in place by Fall, 1994.

## UNIVERSITY POLICY

The University faculty workload policy is designed to give direction to colleges and individual units (departments, etc.) in creating their own workload policies and is based on the philosophy and criteria presented in the Report of the Regent's Advisory Committee on Faculty Workload Standards and Guidelines.

## I. FACULTY WORKLOAD

Three activities, teaching, research/creative activity, and service, make up the full-time faculty workload. In setting appropriate percentages or amounts of each activity for a full workload, the need for flexibility is recognized. Many differences exist between colleges and departments of this University, and these differences preclude the possibility that a single set of percentages or figures can be rigidly applied for all. Therefore, the emphasis given to each activity will depend on the mission of the individual unit. However, the percentage of the unit's total teaching effort should conform to the following specified ranges according to mission:

A. Baccalaureate Department: (Active four-year undergraduate programs with no, or limited, activity in graduate programs)

In general, the norm for teaching activities should be 70-80 percent of a total departmental workload, with the remaining 20-30 percent devoted to other scholarly activities of research/creative activity and service. Full-time faculty should be expected to devote most, if not all, of their teaching effort to undergraduate instruction.

B. Baccalaureate/Masters Departments: (Active baccalaureate and master's degree programs).

For academic departments, or equivalents, with active baccalaureate and master's degree programs, the recommended norm for teaching activities is 60-70 percent of the total departmental workload with the remaining 30-40 percent devoted to research/creative activity, service and other professional activities consistent with the department's mission. It should be expected that full-time faculty in these departments will devote more of their effort to teaching undergraduates than to graduate level instruction.

C. Baccalaureate/Masters/Doctoral Departments: (Active baccalaureate, master's and doctoral programs).

Departments, or equivalent units, with active baccalaureate, masters and doctoral programs should have a norm of 50-60 percent of the total departmental workload devoted to teaching. The remaining 40-50 percent of workload time should be devoted to research/creative activity, service and other professional responsibilities which further the goals of the department and the university. It is expected that full-time faculty teaching in these departments will be personally involved in undergraduate instruction.

The fact that a department offers a master's or doctoral degree is not sufficient indication of an active program. In deciding where a department is located along the continuum from active undergraduate programs to active research/creative activity and graduate programs, consideration should be given to the research/creative activity productivity of the faculty, including externally funded research, and the average number of graduate and/or professional degrees granted annually. It should be the responsibility of the dean, in consultation with the provost, to determine the appropriate division of workload expectation for each department, or equivalent unit, in the college according to the department's level of activity in the degree program it offers.

D. University Two-Year or Associate Degree Programs: (active associate degree programs with no, or little baccalaureate activity).

Faculty whose principal appointment is in university associate degree department/program, with no, or limited, baccalaureate activity, should have undergraduate teaching as their major responsibility. Such faculty members may also have professional development and service as part of their workload expectations, as needed to further the mission of the program and the university.

Departments with associate degree programs should be expected to devote between 80-90 percent of their total workload to teaching related activities, with the remaining 10-20 percent devoted to professional development and service.

#### E. Part-Time Faculty.

Part-time faculty include those persons appointed to carry out instructional responsibilities dictated by enrollment demand or by special needs of an academic unit. Because their primary responsibility is teaching, part-time faculty are not usually expected to engage in other university duties. Like all faculty they are expected to fulfill all teaching obligations, including meeting all sessions of assigned classes, preparation for the classes, timely grading and return to students of assignments and examinations, and maintaining of office hours or another method of permitting students in their classes to meet with them. The actual assignment of instructional responsibilities for a part-time faculty member will be determined by contractual agreement with the university.

#### F. Special Cases.

The University recognizes that all programs may not fit administratively into one of the above categories of departments. In these cases, the appropriate proportion of time to be devoted by the academic unit to teaching should be determined by the dean or appropriate academic officer, subject to approval of the provost/chief academic officer. In these cases, the primary concern should be for undergraduate teaching activities.

For departments or programs that differ significantly from the above classification, e.g. those that have graduate programs but no, or few, undergraduate ones (for example, Polymer Science), the appropriate teaching responsibilities for such departments should be negotiated between the department chair and the college dean or appropriate academic officer subject to the approval of the provost.

## II. FORMULATION OF WORKLOAD POLICY

With the suggested range from the appropriate mission category in mind, individual units are to formulate a workload policy, paying particular attention to the following:

1. Providing quality undergraduate education;
2. Establishing a relative balance between teaching, research/creative activity, and service;
3. Establishing accountability in seeing students needs are met; and,
4. Assuring flexibility in teaching assignments.

The workload policies need to include statements of:

1. Overall workload expectations to ensure a balance of faculty time and effort spent in teaching, research/creative activity, and service. Achievement of this balance for the department (through the assignment of individual faculty) should be the responsibility of the department chair (or other appropriate academic officer), subject to review and approval of the dean.
2. The types and amounts of instruction needed to accomplish the teaching mission of the unit. Normally this will include an analysis of the likely number and types of courses/sections necessary to satisfy the demand for undergraduate general education, undergraduate major and graduate programs.
3. Overall expectations for research and creative activity by the faculty.
4. Overall service contributions expected of the faculty.

### III. GENERAL UNIVERSITY GUIDELINES

The concept of "load credit" represents an attempt to provide a viable method of quantifying certain kinds of activity which the University expects from each faculty member on full time appointment.

The standard load for all full-time faculty on 9-month contracts is 24 load credits per academic year and includes load credit for teaching, administrative responsibility, research/creative activity, instructional support, and service. For full-time faculty on 12-month contracts, the standard load is 24 load credits per academic year and six in the summer. The following policies provide direction for assigning load credit to the activities of each faculty member:

#### 1. Teaching in General

The basic unit for measuring teaching load is the "load credit" which represents one 50-minute period of classroom activity per week for one semester. Load credit assigned for laboratory activities, discussion, etc., is determined by the dean and department chair after consultation with the faculty members involved on the basis of collegiate guidelines approved by the office of the Provost. The following procedures shall be followed in establishing class size and determining load credit:

A. Deans and department chairs, after consultation with the appropriate faculty members, establish minimum and maximum limits on the size of each class. Except in unusual circumstances, as determined by the dean, minimum and maximum limits during the summer are comparable to those in the regular school year.

B. If a regularly scheduled class fails to meet minimum size, the department chair and dean, in consultation with the faculty member may agree to cancel the class and reschedule the faculty member for some other appropriate activity. The class should be cancelled in sufficient time to allow adequate preparation for alternative activities. If the class is not cancelled, the faculty member shall receive full load credit according to the regular guidelines for the type of course.

C. Deans and department chairs are responsible for maintaining equity among faculty in the assignment of large and small classes insofar as faculty qualifications will allow.

D. When a class substantially exceeds the maximum size for which it is programmed, the class may be split or the faculty member may be provided with some kind of extra assistance (e.g., graduate assistant to help grade papers, extra secretarial help, etc.), or additional load credit could be granted with approval of the department chair and the dean.

E. Faculty who teach students who register for independent or individual study, thesis or dissertation research/creative activity, or reading courses may be granted load credit by the department chair in consultation with the dean.

#### 2. Administration

A. Administrative load will be determined by the dean in consultation with the department chair. The amount of credit assigned in each case should be roughly correlated with the following factors:

- 1) Number of faculty, full and part-time;
- 2) Number of majors, graduate and undergraduate;
- 3) Number and variety of program levels;
- 4) Graduate and undergraduate credit hours generated;
- 5) Quality of departmental research/creative activity and scholarly and professional activities;
- 6) Number of graduate assistants and the number and variety of non-professional staff to be supervised;
- 7) Amount and sophistication of departmental equipment; the extent of laboratory involvement; and,
- 8) Extent of interdepartmental cooperation and coordination that is required.

B. Other part-time administrative assignments may be made on the recommendation of the faculty, department head and the academic dean. Such appointments must be based on an explicit description of job responsibilities.

### 3. Research/Creative Activity

Load credit may be granted for scholarly research/creative activity. A written research/creative activity proposal must be approved by the department chair and by the dean of the college before load credit is assigned. The department chair and deans will audit the project at the end of the academic year to determine whether the accomplishments warrant continuing the load credit.

### 4. Instructional Support

With the approval of the dean of the college and the Vice President and Provost, load credit may be assigned for special functions not covered in these guidelines (*e.g.*, counseling and academic advising of students as a special collegiate and departmental assignment, developing and preparing new programs and/or courses, etc.). Load must bear a reasonable relationship to the time necessary to carry out the assignment as well as to the importance of the activity to the department, college or University.

### 5. Service

Load credit may be granted by the department chair in consultation with the dean for service in such areas as university, college, or departmental committees, and professional organizations.

## LOAD CREDIT IN SPECIAL SITUATIONS

### 1. Dividing Load Among Multiple Faculty in Same Course

When a course is taught by more than one faculty member, load credit is divided equitably. The faculty member who is the instructor of record and who is responsible for coordinating the other instructors' activities will first be assigned an amount of credit determined in consultation with the department chair and/or dean. The remainder of the credit will be divided among the other faculty participating as agreed upon by all involved. This policy does not apply to laboratory courses or those with many discussion sections; it is designed for so-called "team teaching" situations or when more than one faculty member participates in lectures.

### 2. Other Special Situations

Some activities (Field Experience, Student Teaching, Supervision, Studio Courses in Art, Play Directing, Coaching, Supervising Interns, Laboratory Supervision, etc.), do not lend themselves to standard University-wide policies. Load credit for such activities is determined in accordance with guidelines established by the department chair and the dean of the college after consultation with the faculty members involved.

## LOAD FOR SUMMER SESSIONS

### 1. Faculty Load

Faculty loads during the summer and interim sessions are determined by the department chair and dean of the college after consultation with individual faculty members. In making assignments, such variables as the number of different courses, (*e.g.*, workshops and institutes) and the experience of the faculty member are taken into consideration. In addition, some limitations must be placed on the number of courses and any other responsibilities a faculty member is expected to carry.

The normal load is six credits for one term and nine load credits for two terms. More than six load credits for one term may be assigned with the express written approval of the collegiate dean.

Credit assigned to faculty for directing workshops shall equal no more than the number of credit hours each workshop carries. However, on the written recommendation of the department chair and dean, a workshop director may be paid an additional stipend if the time included in designing, organizing, staffing and teaching the workshop is considered out of the ordinary. Workshops or institutes offered between Spring Semester and Summer Session I or between the end of Summer Session II and Fall Semester need not be counted as part of the six load credits for one term, but will be counted toward the total of nine load credits for the entire summer.

**2. Summer Load for Administration**

Load credit may be assigned for administering each department/division for the entire summer (Summer I and Summer II). The amount of each allocation is determined by the volume of activity in each department during each summer session. These credits need not be assigned to department chairs per se, but shall be allocated in a manner approved by the collegiate dean. Faculty members are expected to be available in the office a reasonable amount of time each day of the period for which they are awarded the load credit.

Load credit for other administrative responsibilities may be assigned by the dean of the college.

**3. Other Activities**

Any load assigned or remuneration given for activities which are carried out primarily for programs or activities which occur during the regular school year must be budgeted in the department's academic year budget.

**PROCEDURAL GUIDELINES**

1. All activities outlined above are counted as part of the load for any semester and are included on the faculty Academic Activity Report.
2. Overload calculations based on the prescribed conditions are made in the Spring Semester and involve only load credits for the academic year with no carry-over into the summer.
3. Academic Activity Report forms are prepared by or under the supervision of the department chair to assure consistency in application of the guidelines.
4. Load for a course cannot be assigned both to a graduate assistant and to a faculty member. If the graduate assistant actually teaches the class or supervises the laboratory, then the faculty member may not receive load credit.
5. When faculty members are on joint appointment or teach courses outside their "home" departments, the chair of the "home" department or department of primary appointment is responsible for completing the Academic Activity Report and includes on the report all activity performed outside the department.
6. Any question relating to the assignment of load credit should be discussed first with the department chair, and if necessary or desirable, with the appropriate collegiate dean.

