

ADMINISTRATION OF INSTRUCTIONAL WORKLOAD

NORTHERN ALBERTA INSTITUTE OF TECHNOLOGY

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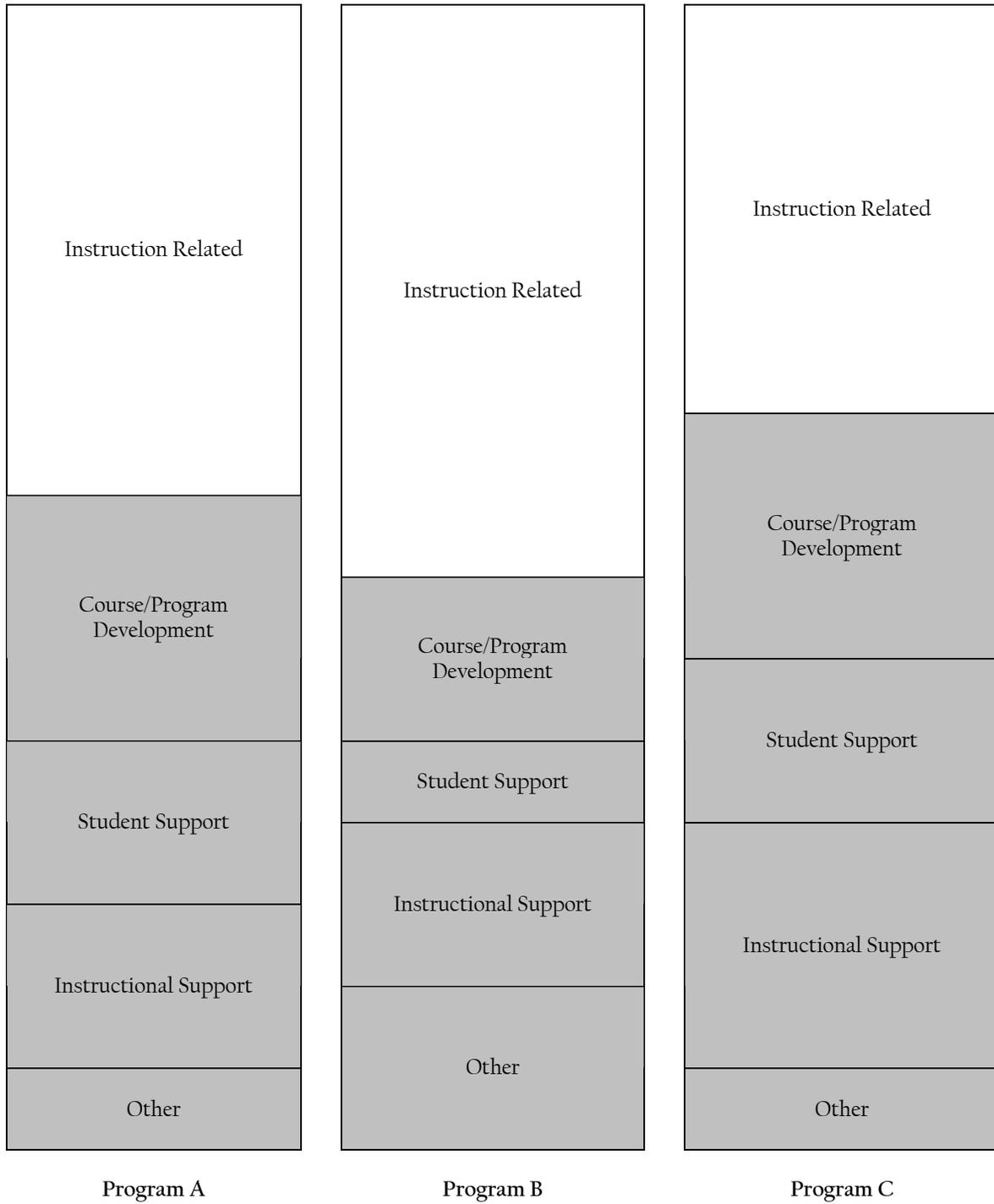
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Instruction Related	<p>1. Role Definitions</p> <p>1.1 Instructor Role</p> <p>The Instructor is responsible for a range of duties, which may be summarized graphically as illustrated. The scope of these duties includes full-time and/or apprenticeship programming activities and, under certain conditions, part-time programming, in collaboration with the Business Development Unit. Duties are fulfilled by the instructor, under the supervision of the supervisor (Note 1), in cooperation with other staff, instructional and non-instructional, of the Institute.</p> <p>Cited duties describe those primary activities that may become the instructor's assignment. Instructors shall not necessarily perform each of the five (5) major duties: rather, the diversity of the instructional modes is such that assignments shall include some combination of the five major duties.</p> <p><u>Duties:</u></p> <p><u>Instruction-Related Duties</u></p> <p>Such duties, relative to classroom/laboratory/shop instruction, include:</p> <ul style="list-style-type: none"> • presentation of classes • management of all learning areas in a safe, effective and efficient environment • selection and implementation of appropriate instructional strategies • development of lesson plans, course materials and instructional aids • evaluation of student performance in a valid and reliable manner • participation in the review and selection of textbooks and course materials • development and maintenance of technical, pedagogical and interpersonal skills • maintenance and/or submission of program/student records accurately and promptly.
Course/ Program Development	<p><u>Course/Program Development Duties</u> inclusive of:</p> <ul style="list-style-type: none"> • maintenance of effective cooperation and communication with colleagues • maintenance of liaison with the industrial/business sector • assessment of current course/program objectives to ensure validity of content • design and development of Learning Outcome Guides, course outlines and program plans • identification and preparation of course/program objectives. • development and implementation of alternative or distributed delivery strategies.
Student Support	<p><u>Student Support Duties</u> inclusive of:</p> <ul style="list-style-type: none"> • maintenance of an impartial attitude towards and among students • discussion with students of personal and financial matters, training, career and employment objectives, in so far as such matters generally relate to the instruction being offered to those students • provision of tutorial/remedial instruction.
Instructional Support	<p><u>Instructional Support Duties</u> inclusive of :</p> <ul style="list-style-type: none"> • maintenance of security in instructional facilities • participation in the maintenance of shop/laboratory equipment • participation in a range of activities to ensure that instructional facilities are clean, orderly and safe, and conducive to an effective training environment • assessment and recommendation in respect of acquisition of instructional equipment and supplies • participation in budget preparation
Other	Other Duties

Note 1: Supervisor, in the context of this document means the working titles of Program Head, Program Chair, Team Leader or Program Coordinator. The assistant supervisor means Assistant Program Head, Assistant Program Chair. Other supervisory working titles may evolve which are applicable to the role descriptions contained herein.

Instructor Role Components – Program Variations



NOTES:

- Considering the diversity of NAIT programming, the component distribution resident in the instructor role can vary significantly from program to program.
- An instructor can be fully loaded at different CCP levels due to these variations.
- Individual program overload threshold levels have been established in recognition of these differences in the context of accepted historical norms.

Educational Leadership	<p>1.2 Supervisor Role</p> <p>The Supervisor has responsibility for a range of activities, which may be summarized graphically as illustrated. The scope of these functions includes full-time and/or apprenticeship programming activities and, in collaboration with the Business Development Unit, part-time programming. These roles generally include the following components:</p> <p><u>Educational Leadership:</u></p> <p>The “Educational Leadership” functions include student-focused activities, activities leading to effective staff performance, activities leading to effective programming, activities leading to effective and efficient instruction, and activities leading to effective external liaison and internal cooperation, such as:</p> <ul style="list-style-type: none"> • application of student recruitment and selection strategies. • student counseling, guidance, evaluation and discipline. • management of staff performance (direction, supervision and performance evaluation). • development and maintenance of a beneficial organizational climate. • advisement to, and motivation of, staff for personal/professional upgrading and development. • ongoing review, evaluation and revision of existing programs to maintain continuing relevance, effectiveness, and acceptance by industry. • leadership guidance in the development and application of relevant instructional methodology and technology. • development and maintenance of effective advisory committee operations.
Instructor Role	<p><u>Instructor Role:</u></p> <p>Function includes direct instruction, in a classroom, laboratory or shop and all the related support activities resident in the instructor role.</p>
Administrative and Administrative Support	<p><u>Administrative and Administrative Support:</u></p> <p>The “Administrative and Administrative Support” functions include activities such as:</p> <ul style="list-style-type: none"> • planning for manpower and non-manpower resources; assisting in the acquisition of resources; organizing and allocating of resources; controlling and evaluating resource use; • reporting/communication; • student “grouping” by sections; instructional load assignments and timetabling; • capital and supply acquisition, control of inventory and physical plant changes; • preparation of descriptive literature and reports; • application of Institute policies and operational guidelines/procedures. <p>Underlying all functions is the development and maintenance of effective communication with students, staff, supervisory/management personnel, the industrial/business sector including advisory committees and various other external constituents.</p>

1.3 Assistant Supervisor Role

The role of the assistant supervisor is defined in relation to the supervisor role. This role varies among Institute programs, and can be either a:

- Generalist role in support of the supervisor in all functions and activities, or a
- Specialist role in which the assistant supervisor bears primary responsibility for some functions and activities as assigned by the supervisor.

2. Overload – The Concept

2.1 Roles

As noted in 1.1, the role of the instructor includes:

- Instruction related duties,
- Course and program development duties,
- Student support duties,
- Instructional support duties, and
- Other duties

For most instructors, the instruction related duties component is the predominant element in terms of spent time. However, the exact proportions of time spent on the various duties will differ from program to program – indeed, from one instructor to another.

Assignment(s) detailed for the academic year, the semester, or the intake may not represent the entirety of what is or will be expected of that instructor. Just as a budget will normally contain some provision for unforeseen items, so also the initial assignment will often allow for some uncommitted time to permit substitution or to facilitate adjustments that may become necessary during the academic year, the semester, or the intake.

2.2 Measurement of Instructor Workload

Many parts of the instructor's role do not lend themselves to quantification. Such components as course/program development, intensity of instruction, and student support have so many facets and represent such a broad range of elements that NAIT has not found it feasible to quantify them.

The number of *Class Contact Periods (CCP)* is one component that can readily be measured objectively on a consistent basis. A single period is typically a scheduled 55 minute time block during which a staff member has sustained contact with a class in an instructional context. Another related variable that can be measured objectively is the number of *Student Contact Periods (SCP)*. Over the years, NAIT has evolved a pattern of CCP's that, (in conjunction with the other associated ordinary components of the instructor role), represents a full-time assignment. The CCP component of this full-time assignment on an annual basis (July 1 to June 30) is called the *Overload Threshold (OT)*.

2.3 Application of the Overload Threshold

An instructor who completes CCP in excess of the applicable OT is eligible to be compensated under the "overload" provisions of the collective agreement.

Further, assigned activities that are extraordinary (i.e. clearly beyond the ordinary activities outlined in the role description) are evaluated in terms of their impact on the staff member's ordinary role. The level of impact of each *explicit extraordinary assignment* is expressed numerically as an EEA. The staff member's *total assigned load* for an academic year is the total of his assigned CCP (regularly scheduled CCP and substitution CCP) and EEA. If the total assigned load exceeds the applicable OT, *overload* is paid in accordance with the collective agreement.

3. Overload Threshold in Special Cases

3.1 Special Cases – Supervisors or Assistant Supervisors

- a) The CCP loads of modified instructional staff (supervisors or assistant supervisors) are normally lower than those of instructors in the same program. This reduction results from the involvement of these staff members in educational leadership and the administrative and support components inherent in their roles. The reduction in the overload threshold for these staff members is achieved by application of a proportionate loading factor “m”, whose value is set based on the circumstances of the program, including precedent.
- b) Since “m” finds application in situations related to specific roles or special status, it is subject to review or change at the Dean level.
- c) In normal circumstances, for instructors (i.e. non-modified instructional staff), “m” is equal to 1. In circumstances where “m” is less than 1, the staff member’s overload threshold is equal to the individual (composite) overload threshold multiplied by “m”.

3.2 Special Cases – Other

Currently, the tracking software utilized for Instructor workload does all calculations for blended or composite loads and leave conditions. The examples cited below are illustrative and demonstrates the basis for the software calculations.

3.2.1 Prorated and Blended Thresholds

This Section is designed to clarify the application of subsections 16.05 and 16.07 of the collective agreement. Overload threshold is an annual instructional load. During the year a variety of situations arise that can alter the available instructional time; therefore, proration or blending of the overload threshold may be required. Staff leaves require consideration of time-dependent proration of the OT. Mixed assignments and role changes require the establishment of a composite OT for the individual concerned. Part-time employment requires that appropriate adjustments be implemented.

3.2.2 Time Dependent Reduction of Overload Thresholds

If a staff member is on leave for more than 5 consecutive work days, section 16.07 should be applied as follows:

Situation #1 (Staff Leave)

The instructional time missed is 4 weeks, program overload threshold is 641 and the scheduled CCPs during the leave were 60 hours. The proration in weeks per 40 instructional weeks available is 4/40 of the OT = 64.

As indicated in section 16.07, the OT should be reduced by the lesser of these two scenarios. Therefore, presuming the individual OT is 641, the revised Overload Threshold should be $641 - 60 = 581$.

Situation #2 (Staff Leave)

The instructional time missed is 6 weeks, program overload threshold is 641 and the scheduled CCPs during the leave were 108 hours. The proration in weeks per 40 instructional weeks available is 6/40 of the OT = 96.

As indicated in section 16.07, the OT should be reduced by the lesser of these two scenarios. Therefore, presuming the individual OT is 641, the revised Overload Threshold should be $641 - 96 = 545$.

3.2.3 Composite Overload Threshold – see also 2.5

Some instructors teach for two (or more) programs that have different overload thresholds. To determine the composite overload threshold, the course CCP's are used. The same scenario applies to role changes within or between programs.

Situation #1 (Mixed Assignment)

A staff member instructs 410 CCP's in courses with an OT of 755 and instructs 400 CCP's in courses with an OT of 641.

$$\begin{aligned} 410/755 &= .54 \text{ of full load} \\ 400/641 &= \underline{.62} \text{ of full load} \\ &1.16 \text{ composite load} \end{aligned}$$

$$\text{Composite OT} = \text{Total CCP/Composite Load} = 810/1.16 = 698$$

Situation #2 (Mixed Assignment)

A staff member instructs 310 CCP's in courses with an OT of 755 and instructs 300 CCP's in courses with an OT of 641.

$$\begin{aligned} 310/755 &= .41 \text{ of full load} \\ 300/641 &= \underline{.47} \text{ of full load} \\ &.88 \text{ composite load} \end{aligned}$$

$$\text{Composite OT} = \text{Total CCP/Composite Load} = 610/0.88 = 693$$

Situation #3 (Role Change)

An instructor teaches 400 CCP's at an instructional OT of 641, then teaches 100 CCP's at an OT of 320 in the program head role.

$$\begin{aligned} 400/641 &= .62 \text{ of full load} \\ 100/320 &= \underline{.31} \text{ of full load} \\ &.93 \text{ composite load} \end{aligned}$$

$$\text{Composite OT} = \text{Total CCP/Composite Load} = 500/.93 = 538$$

In situations where SCP impact may be a factor, consideration should be given to an "m" factor adjustment.

3.2.4 Salaried Full Time Staff (Part Year)

In some circumstances staff members may work full time but less than a full academic year, for example a planned retirement at the end of a mid year semester or intake.

In these cases the annual Overload Threshold would apply and eligibility for overload payment based on a time based proration would not normally apply.

However, the part-year instruction would be established based upon various factors, including the personal circumstances of the instructor, the nature of the program, the courses normally assigned (the anticipated class and student contact periods), to the instructor for that or a similar period, the amount of notice provided and the need for training and orientation of any replacement.

3.2.5 Salaried Part Time Staff (Year Round)

Some staff members are hired to work for a full academic year, but less than normal hour's i.e. part-time (p/t). The part-time salaried rate is established based upon various factors including nature of the program, the courses assigned (the anticipated class and student contact periods) or the personal circumstances of the instructor.

In these cases, the p/t rate is expressed in terms of the proportional loading factor 'm'

E.g. An instructor requests to only work full time 4 days per week
Proportional loading factor 'm' = 0.80

An instructor's course load for the year, under p/t conditions is 480 CCP on an OT of 641
Proportional loading factor 'm' = 0.75

In some cases the p/t rate may be established at the beginning of the year and circumstances occur which may modify the p/t rate of pay e.g. substitution, high SCP levels etc.

Supervisors should monitor these circumstances and if necessary adjust the p/t rate, on a semester or term basis to minimize the potential for overload pay.

In circumstances where adjustments of this nature are not possible or predictable, overload may be paid at the year end based on the accumulated instruction.

3.2.6 Sessional Staff

Sessional staff members are not subject to annual workload thresholds and are not eligible for overload payments. A sessional staff member's instructional load for a term, semester or intake would not exceed that of a salary staff member for a similar period. This type of employment is paid at an hourly rate.

The hours of work for a sessional staff member shall be established at the commencement of each assignment, in consultation with Human Resources, giving due consideration to the teaching assignment and attendant preparation/student support time, recognizing that this may vary from department to department

The individual OT for these staff is exactly the number of instructional hours for which they were engaged; hence overload pay is not applicable to this type of employment.

4. **Extraordinary Assignments**

Instructors **ordinarily** have assignments that, in addition to their instruction-related duties, include course and program development, student support, and instructional support. The proportions of these duties will vary from year to year and from one instructor to another. Further, for any given instructor, the time spent on the various role elements will vary from one part of the academic year to another. Instructors should also expect that there will **ordinarily** be some other assignments in support of program, course, or student activities.

Modified instructional staff (supervisors and assistant supervisors) plays a more significant role in course and program development than does an instructor. They also exercise delegated authority to supervising program staff and assume a leadership role in the academic and administrative aspects of their programs. Responsibilities such as these might be **extraordinary** in the case of an instructor, but are **ordinary** for supervisors and assistant supervisors. These **ordinary** responsibilities are reflected in a reduction in the overload threshold typically assigned to these staff, achieved through an appropriate value of the proportionate loading factor "m" as described in 3.1.

4.1 Differentiating the Extraordinary From the Ordinary

To be considered “extraordinary”, an assignment must impact significantly on a staff member’s ability to deliver the CCP normally expected. This impact might result from encroachment on CCP delivery times, on lesson planning or marking schedules, or on inter-semester course development time. The extraordinary assignment may be in any of the elements of the staff member’s role.

Generally, activities should be considered as **ordinary** if they have no impact or only minor impact on a staff member’s ability to deliver planned CCP.

Many circumstances occur where an instructor has assigned instruction that is less than the overload threshold. Supervisors typically exercise discretion and ensure that staff with this loading pattern are actively engaged in ordinary instructor activity in this non teaching time. Since the nature of the activity fits clearly in an **ordinary** instructor role it would not be considered **extraordinary** for EEA definition or description.

4.2 Evaluating Explicit Extraordinary Assignments

The EEA granted to a staff member should reflect the degree of impact that the assignment has upon the staff member’s ability to deliver the ordinary CCP load. In evaluating EEA’s, supervisors and managers must look at all relevant factors. They must consider not only the magnitude of the new assignment, but also its impact in the unique context of the staff member’s ordinary assignments. Supervisors and managers responsible for evaluating EEA’s must remember that **extraordinary assignments may arise in any component of the instructor role**. They must weigh factors of the type shown in the following examples.

4.2.1 Instruction Related EEA’s

Course Coordination:

An EEA for course coordination should reflect the following factors: length of course, nature of course (mix of lab, shop, class), number of sections of course, number and experience of instructors involved in course, extent of updating requirements (if any), and relationship to staff member’s other assignments.

SCP Count:

It is recognized that class size can contribute significantly to instructor workload in the form of additional marking load, individual student consultations, etc. Relative to normal instruction, and the basis upon which program overload thresholds are established, these conditions are considered extraordinary and receive recognition in the form of an explicit extraordinary assignment related to student contact periods (EEA_{SCP}). The level of recognition is based on the empirically-derived mathematical model described in the NAIT/NASA collective agreement.

New Instructors:

The first year’s work assignment may be reduced to facilitate the transition to an instructional role. The size of the EEA should reflect such factors as the staff member’s level of experience and expertise, prior instructional experience (if any), level and complexity of the course material, and availability of resources and guidance.

4.2.2 Course Development EEA’s

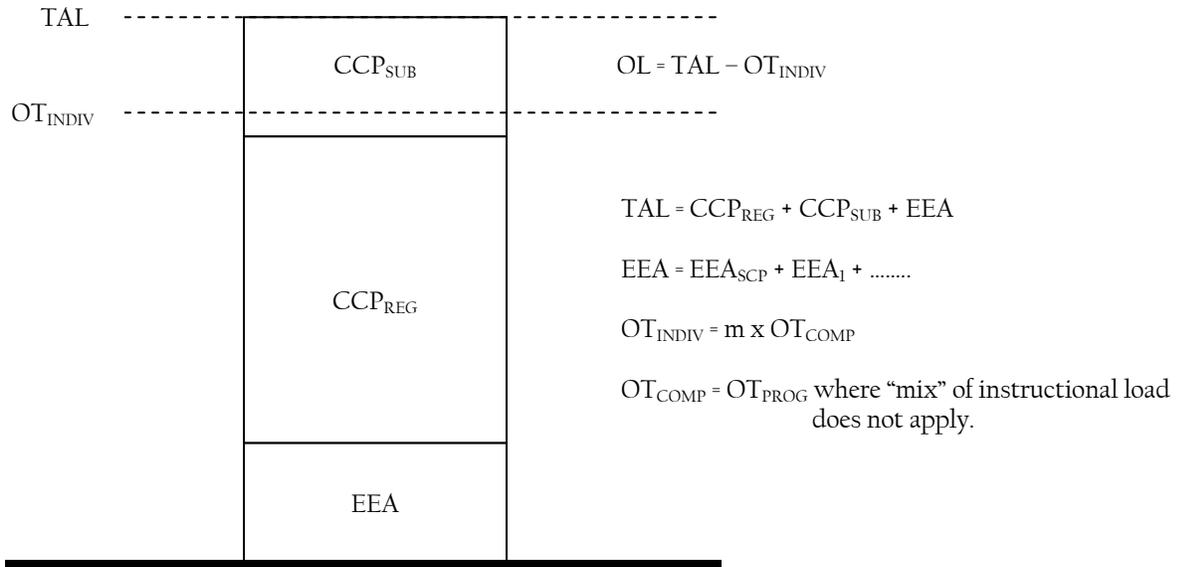
An EEA for course development should reflect: length of course, nature of course (mix of lab, shop, class), similarity to existing courses, responsibility for originating material (as opposed to adapting, updating or copying), and relationship to staff member’s other assignments (including those during non-instructional periods). Normal course preparation, maintenance, and revision are not eligible for EEA treatment.

5. The Overload Model

Symbols:

CCP.....	Class Contact Periods
SCP.....	Student Contact Periods
OT.....	Overload Thresholds
OT _{PROG}	Program Overload Threshold
OT _{COMP}	Composite Overload Threshold
OT _{INDIV}	Individual Overload Threshold
m.....	Proportionate Loading Factor
CCP _{REG}	Regularly Assigned Instructional Load
CCP _{SUB}	Substitution Instructional Load
EEA.....	Total Explicit Extra-Ordinary Assignment
EEA _{SCP}	EEA Recognition for Student Contact Periods
EEA _N	EEA Recognition for Individual EEA Pre-Approved Contracts
TAL.....	Total Assigned Load
OL.....	Overload

Calculations:



6. Forms

EXPLICIT EXTRAORDINARY ASSIGNMENT
PLANNING SHEET

PROGRAM: _____

STAFF MEMBER: _____

ROLE: _____

OVERLOAD THRESHOLD: _____



WORKLOAD ADJUSTMENTS

EXPLICIT EXTRAORDINARY ASSIGNMENTS: (Attach clarification or details as necessary)

- 1. _____

- 2. _____

- 3. _____

- 4. _____

Total of Above EEA'S _____



BEFORE-THE-FACT COMMITMENT

AFTER-THE-FACT CONFIRMATION

Staff Member Date

Staff Member Date

Supervisor Date

Supervisor Date

Dean Date

Dean Date

*Signatures indicate that the staff member has been involved in the planning process and that the Supervisor and Dean have approved the activity and any required resources.

Report ID: N_SA706A

INSTRUCTOR WORKLOAD

Page No. 1
Run Date: 23-FEB-2005
Run Time: 10:12:25

Academic Year - 2004/2005

Instructor ID:
Academic Org: 370401 Office & Records Admin

Instructor Workload Summary			CCP	SCP
Composite Threshold	628	Workload	336	9120
X Composite m-factor	54.00%	Substitution	0	n/a
=Net Threshold	339	Extra	0	n/a
- Reduction	0	Explicit Extraordinary Assignments (EEA)	0	n/a
= Overload Threshold	339	EEAscP	0	n/a
- Total Load	336	Total Load	336	9120
Overload	0			

Course Workload									
Term	Course Code	Course Name	Role	Enrolment	Team	CCP	SCP	Threshold	
1041	BUS 147-96	Computers in Business	PI	18	1	48	864	598	
1041	MTR 126-11	Medical Office Procedures I	PI	31	1	32	992	641	
1042	BUS 147-85	Computers in Business	PI	27	1	48	1296	598	
1042	MTR 236-21	Medical Office Procedures II	PI	30	1	32	960	641	
1042	ORA 233-22	Administrative Procedures	PI	27	1	64	1728	641	
1042	ORA 233-23	Administrative Procedures	PI	28	1	64	1792	641	
1042	MTR 227-21	Med Office Info Processing	IIPI	31	1	48	1488	641	

Explicit Extraordinary Assignments (EEA)		
Term	Assignment Title	CCP Equivalent

Reduction				
Term	Reduction Comment	CCPs Missed	Work Days Missed	Weeks Missed

Authorizations
The undersigned agree that the data on this form accurately reflects the workload of this instructor.

Name	Signature	Date
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Instructor: _____

Program Leader: _____