



To request a form to complete and submit please email provostoffice@oit.edu or call 541 885 1663

Workload Allocation Requests: Process and Guidance

Workload reallocation is intended to allow faculty members time to pursue research projects that will enhance the reputation of the university, make an impact in the faculty member’s field of expertise, engage students in the research process, and help faculty engage more in professional development as a part of their contractually obligated workload. Article IX of the *Inaugural Collective Bargaining Agreement* (CBA) provides stipulations for faculty who would like to reduce their Instructional Workload. As the workload expectations are slightly different for tenure/tenure track faculty and fixed term faculty, there are two separate, but similar sections of the CBA.

Tenure Track Faculty		9 month	11-12 month
	Instructional Workload (IWL)	36	48
	Non-Instructional Workload (NIWL)	9	12
Non-Tenure Track Faculty			
	Instructional Workload (IWL)	42	56
	Non-Instructional Workload (NIWL)	3	4

In all cases there is the acknowledgement that these ratios may change across an academic year, or across a faculty member’s career. However, to decrease IWL, a faculty member must receive approval from the College Dean, and prepare documentation of how the alternative assignment was satisfactorily completed.

The process articulated here is intended to support research efforts of all faculty in all subjects—including projects that are underway or just beginning, funded internally or externally or not funded at all. Finally, the reallocation of workload should be used to foster and grow a culture of research in departments and throughout Oregon Tech. This document provides instructions, a set of due dates, and guidance on completing the Workload Allocation Form.

Instructions:

- 1) Faculty member discusses a plan their department chair.
- 2) Faculty member develops a draft of plans and shares with department chair. Faculty member makes any necessary modifications after consultation with the department chair.
- 3) Faculty member goes to TechWeb→Faculty Forms/Guidelines→ finds allocation documents and forms. There you will request the DocuSign via email to provostoffice@oit.edu (instructions included on TechWeb). NOTE: faculty member will NOT be able make edits once the form is submitted for formal evaluation.
- 4) Department chair approves or denies the request, with justification.
- 5) The form will be then sent to the Dean (all requests will go to the Dean for review).
- 6) The dean reviews the form and, if needed, asks for further information/clarification, then either approves or denies the workload allocation request, with justification.

Due Dates:

Action Item	Due Date	Comment
Workload Allocation Form submitted to department chair	Day 1 of Week 10 – 2 terms prior	<ul style="list-style-type: none"> • Requests for Fall due Week 10 of Winter term • Requests for Winter due End of Summer term • Requests for Spring due Week 10 of Fall Term • Requests for Summer due Week 10 of Winter term
Department chair and faculty discussion and adjustment	Between Week 10 and the third day of Week 1 of the following term (a term prior to when reduction is to be effective) a decision to proceed should be made by the chair and modifications must be made.	Example: Faculty submits request to chair Week 10 of Fall term. Faculty and chair have until the 3 rd day of Week 1 of Winter term to discuss and make necessary adjustments before moving forward and submitting to the dean.
Department chair submits Workload Allocation Form to college dean	Form should be submitted by the 3 rd day of Week 1 the term prior to requested reallocation.	Example: If a faculty member requests reallocation for Spring term, the request should be submitted to the dean by Wednesday of Week 1 Winter term.
Dean's Decision	By the end of Week 2 the term prior to requested reallocation.	Example: A request is made for Spring term. The Dean approves or denies the workload reallocation and reports that decision to the department chair by the end of Week 2 of Winter term.
Internal Report Due (See Internal Report Form) Status Update for multiple terms Final Report for one term or the last term	By the end of Week 1 the term following the reallocation.	Example: Faculty member receives reallocation for Fall and Winter terms. The faculty member will submit an Internal Report - Status Update by Week 1 of Winter term and an Internal Report – Final Report by Week 1 of Spring term.
*Requests made during the year will be considered from term to term		



Workload Allocation Form Guidance

Requested Allocation

This section should include the number of instructional workload units and the term(s) that the faculty member would like to reallocate to research.

Justification for the Reallocation

This section must clearly explain, in no more than a page, the scope of the project and include reasons why the requested amount of reallocation is necessary for the project. The justification section should include the following:

- Objectives of the project. Indicate whether this is a new project or one which is currently underway.
- Significance of the work to your discipline.
- How does the work enhance your research or scholarship and advance your career goals?
- Will it include students – undergraduate and/or graduate and how will this benefit the students – will there be a conference presentation for example. How will it benefit the program?
- If applicable, previous work done by you in the field. (Include a list of your relevant publications, including previous and related work). Include information if funding is available.
- How the project will exceed the currently allotted NIWLUs

Project Timeline

This section must briefly explain when you will complete the tasks of the project and what the project deliverable will be. For example, if a faculty member is requesting a reallocation of workload in Winter term, the faculty should describe when major tasks will be completed during and after this term. Briefly state when they will deliver findings, presentations, publications, or grant proposals.

This section should also include a coverage plan for any course(s) that might be required by programs and that would not be taught because of reallocation. It may be that no coverage is required. The coverage plan should be developed by the faculty and approved by chair or can be developed along with the department chair.

Internal Report Form

This form provides an update to the department chair and dean on the progress of the project for which workload reallocation was granted. The faculty member must select either “Status Update” or “Final Report”. Status Update must be selected if the faculty member has received more than a one term reallocation and is simply updating the department chair and dean on the progress. The faculty member must select Final Report if workload reallocation was granted for one term or is in the last term of the reallocation.

In the summary of activities and description of deliverables section the faculty must describe the work that has been done during the time in which they received workload reallocation. The faculty must address the original plan of research and list the status of deliverables, any difficulties or obstacles that they have faced, and plans for future work.

Once the form has been completed, the faculty member must submit the form to their department chair for review. After review, the department chair must then submit the internal report form to the dean in accordance with Article IX, Section 5 c and Section 6 c.