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## College of Agriculture Faculty Workload Plan

**Effective Date: 8 October 2019**

### **A. Overview & Guiding Principles**

The mission of the university broadly guides the expectations associated with the faculty member's responsibilities, with appropriate adjustments as necessary to fulfill college or department needs. Faculty workloads must meet the needs of delivering the required coursework in each program. At Montana State University, tenurable and tenured faculty have responsibilities in the areas of teaching/learning, scholarship/discovery, and service/outreach. Individual assignments in each of these areas may vary within the college.

In the College of Agriculture, tenurable and tenured faculty have responsibilities in the areas of teaching/learning, scholarship/discovery and service/outreach. These responsibilities are distributed among the faculty in a department. Under this policy, each department will develop a Workload Plan consistent with the principles stated in this policy and the University workload policy. When possible, department plans should establish workload distributions and corresponding performance expectations consistent with those at comparable or aspirational units at peer institutions.

Tenable and tenured faculty members' teaching/learning, scholarship/discovery and service/outreach responsibilities are allocated as a percent of the faculty member's total effort, referred to as Percentage of Effort (POE). The total apportionment of POE across all areas will be 100%. All faculty will have a defined POE in each of the areas of teaching/learning, scholarship/discovery and service/outreach, distributed such that faculty members have comparable total effort.

Expectations and performance indicators for teaching, scholarship, and service are defined within the departmental Role and Scope document that guide retention, tenure, promotion, and annual reviews. Broadly, teaching encompasses on-campus instruction and Extension education, student advising and scholarly mentoring for undergraduate and graduate students. Scholarship encompasses the creation of original intellectual work, the securing and administration of grants and contracts, and the creation of partnerships, programs, and plans through Extension. Service encompasses the contribution of faculty knowledge and expertise to assist and engage individuals and organizations. Service activities fall in three broad categories: professional service, public service (i.e., engagement), and university service.

The College of Agriculture recognizes that the effort required to teach a regular classroom course often varies based on numerous factors. However, faculty also commonly adjust their teaching methods in order to account for certain degrees of difference in number of students, course structure, contact hours, grading requirements, etc.

The Departmental Workload Plans will assign workload expectations for classroom teaching in the context of other teaching contributions; e.g., graduate student mentoring and advising. This will provide increased transparency for faculty to understand workload differences among faculty.

The Department Heads are responsible for assigning faculty teaching/learning, scholarship/discovery, and service/outreach workloads, subject to the approval of the Dean and the Provost. General descriptions of position responsibilities are included in each faculty member's letter of hire or mutually agreed upon change of duties during annual reviews.

## **B. Types of Appointments**

### 1. College Appointment

Faculty members with College Appointments are expected to engage in teaching/learning, scholarship/discovery, and service/outreach activities commensurate with their appointment. Teaching/learning, scholarship/discovery, and service/outreach expectations are described in this document and in the individual departmental Role and Scope documents. The normal assigned percentage of effort for College Appointment vary by department.

### 2. Montana Agricultural Experiment Station Appointment (MAES)<sup>1</sup>

Faculty members with MAES appointments are expected to engage in teaching/learning, scholarship/discovery, and service/outreach activities commensurate with their appointment. Teaching/learning, scholarship/discovery, and service/outreach expectations are described in this document and in the individual departmental Role and Scope documents. Scholarship duties include research tied to Montana agriculture and natural resources. Other duties include off-campus teaching and outreach/engagement. Faculty with MAES appointments are expected to have an active Hatch project that undergoes external peer review on a scheduled basis. More information about Hatch project reviews is available on the College of Agriculture website. The normal assigned percentage of effort for MAES appointments vary by department.

*i. Appointment.* Decisions regarding faculty appointment to the Montana Agricultural Experiment Station are at the discretion of the MAES Director. The Department Head (and appropriate department committee where utilized) can occasionally make recommendations to the MAES Director for changes in MAES appointments. These recommendations are made based on the stated goals of MAES and based on a demonstrated ability and history of faculty meeting those goals. Any changes in appointment must be approved by the faculty member, Department Head (and appropriate department committee where utilized), COA Dean, and MAES Director.

### 3. MSU Extension Appointment (MSUE)<sup>2</sup>

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<sup>1</sup> The Montana Agricultural Experiment Station (MAES) was established in 1893, in accordance with the provisions of the Hatch Act of 1887, to improve the production, marketing, and use of Montana's agricultural and natural resources through research and outreach. MAES is a federal/state funding and programmatic partnership with the National Institutes on Food and Agriculture (NIFA) for Hatch Act, Multistate, and Animal Health base funds. MAES strives to: 1) provide leadership in developing ambitious, competitive and imaginative research activities that create new discoveries, positively impact undergraduate and graduate learning and gain national and international recognition; and 2) disseminate new research discoveries and deliver outreach programs that serve Montana in a global economic environment.

<sup>2</sup> MSU Extension was established in 1914 as a result of the passage of the Smith-Lever Act. "...extension work shall consist of the giving of instruction and practical demonstrations in agriculture and home economics to persons not attending or resident in said colleges in the several communities..." The Memorandum of Understanding between Montana State College and the federal government was signed on August 3, 1914. MSU Extension is a statewide network that connects university resources with grass-roots needs in the areas of agriculture, 4-H youth, family and consumer sciences and community development. Access to useful information and expert knowledge is provided via workshops, demonstrations, community meetings, publications, videos, the Web, radio and television.

Faculty members with Extension appointments are expected to engage in teaching/learning, scholarship/discovery, and service/outreach activities commensurate with their appointment. Responsibilities include extensive off-campus teaching and service/outreach across the state for producers, families, and other audiences. Scholarship duties include research and engagement tied to Montana agriculture, natural resources, and family and consumer sciences. The normal assigned percentage of effort for MSUE appointments vary by department.

i. *Appointment.* Decisions regarding faculty appointment to Montana State University Extension are at the discretion of the Director of MSU Extension. The Department Head (and appropriate department committee where utilized), in consultation with those with MSUE appointments, can occasionally make recommendations to the MSUE Director for changes in MSUE appointments. These recommendations are made based on the strategic plan of MSUE and based on a demonstrated ability and history of faculty meeting those goals. Any changes in appointments must be approved by the faculty member, Department Head (and appropriate department committee where utilized), Dean/Director of the resultantly affected agency, and Director of Extension.

#### 4. Joint Appointments

For faculty who hold joint appointments, their total workload should be commensurate with that of faculty on single appointments in corresponding disciplines. The Memorandum of Understanding governing the appointment should specify how responsibilities for assigning workload will be shared between the units' heads/directors. In the event that the units involved in the joint appointments establish Workload Policies and Guidelines that set different standards, the Memorandum of Understanding must clarify how those standards will be applied to that individual. Such appointments require approval from the directors/deans from the partnering colleges and/or agencies.

#### 5. Administrative Appointments

Faculty who hold administrative appointments have an expectation of service/outreach with an assignment of teaching/learning and/or scholarship/discovery activities commensurate with their appointment. Teaching/learning, scholarship/discovery, and service/outreach expectations are described in this document and in the individual departmental Role and Scope documents.

### **C. Assigned Percentage of Effort (POE) Requirements and Changes**

Percent effort assignments will vary for each faculty and type of appointment and are changeable. Scholarship will typically not be less than 20% of any appointment and service efforts shall be no less than 10%. The College of Agriculture considers a typical teaching POE of 40-50% to be 4 instructional equivalents along with student advising responsibilities. There must be a transparent linkage between POE and teaching duties with each department. Alternate forms of teaching such as graduate student mentoring and undergraduate advising may be equated to an instructional course, but faculty with a teaching responsibility will be expected to teach at least one or more instructional courses per academic year, depending on the teaching POE.

In the spirit of the land-grant mission, the College of Agriculture considers all faculty as engaged scholars. Faculty may integrate community engagement or engaged economic development in their scholarship and/or teaching POE.

If the assigned percentages of effort are inconsistent with the faculty member's current activities and levels of performance, a revision of the assigned percentages of effort should be discussed. The change in the percentage of effort will follow the College of Agriculture and departmental workload policies. The faculty member or

department head can propose changing the faculty member's percentage of effort. Changes to a faculty member's assigned percentages of effort must be approved by the faculty member, department head, and dean. For MAES and MSUE appointments, the respective directors must also approve the assignment modification. If a modification of the assigned percentages of effort is made as outlined in Section 4 of the faculty handbook, it will be documented using the Faculty Assigned Percentages of Effort Update Form.

#### **D. Leave and Extended Absence Policy**

The College of Agriculture is committed to facilitating professional development of its faculty members. Occasionally, such professional development includes leaves of absence for faculty to serve on committees, councils, panels, or as visiting fellows or faculty at other institutions. Such leave may take the form of sabbatical assignment leave or leave without pay. The MSU faculty handbook describes university policy regarding such leaves. All leave applications must be submitted to the Department Head (and are forwarded to the appropriate department committee where utilized) for review. The Department Head (and appropriate department committee where utilized) make(s) decisions regarding leaves based on university policies, available resources, time since last leave, departmental situation (faculty vacancies, adjunct pool, etc.) and prestige of leave appointment. Faculty members who take leave for a portion of the year will be expected to fulfill the remaining portion of their responsibilities.

#### **E. Teaching**

Montana State University and the College of Agriculture has an obligation to provide quality educational opportunities. The departments must deliver the required coursework in each program; consequently, faculty workloads must be sufficient to deliver the program courses.

##### 1. Instruction

Instruction performance indicators, weighting, and expectations are outlined in the individual departments' Role & Scope. On-campus instruction is defined as instruction of students enrolled in Montana State University courses be they face-to-face or online. Off-campus instruction is defined as Extension education for audiences other than enrolled MSU students.

##### i. On-campus Instruction

*a. Standard Instructional Load.* Because the College of Agriculture recognizes and values that the instructional format varies greatly by department and discipline, each department (department faculty and head) in the College of Agriculture shall set their standard teaching load through their departmental workload policy. A typical instructional course is a 3-credit course in which the instructor's responsibilities include prep, lecture, review, grading assignments and examinations. For instructional courses that depart from this typical form (large course size, lab sections, studio time, online courses, etc.), the workload associated with a non-typical course should be tabulated in each department for each course. One course should not be considered more than 15% POE. After discussion with the faculty member, teaching assignments are made by the Department Head with input from appropriate committees or chairs of committees. Teaching schedules must: (1) provide reasonable scheduling opportunities for students to remain on-track and on-time for their degrees, and (2) provide time for faculty to engage in scholarly and service activities commensurate with community standards.

*b. On-campus instruction buyouts.* Faculty may occasionally have access to grants or other funds to invest in alternate forms of integrating scholarly activities with teaching/learning and service/outreach (e.g. additional graduate student mentoring and advising). On-campus instruction

buyouts should only be considered when grant and scholarly activities, including project implementation, experiment oversight and publications, will exceed the faculty's assigned percentage of scholarly activity. Faculty members seeking to buyout a course should notify their Department Head when the grant is submitted and submit a proposal to the Department Head for consideration as soon as funding is finalized. Included in this proposal should be sufficient funding for salary and benefits of a replacement instructor and justification showing an equivalent effort in additional graduate student supervision, publications, and grants. Only in very unusual and rare circumstances would a buyout of more than half of a faculty member's instructional load be granted, and only in very unusual circumstances would consistent buyouts across academic years be granted. Apart from sabbatical or other leave approved in advance by the Dean and Provost, no faculty member with 40-50% instructional POE whose FTE salary is paid from University general funds will teach less than two instructional courses per academic year. Under exigent circumstances, a Department Head and Dean may allow a faculty member to fund a portion of their salary from sources outside of state general funds and proportionately reduce their teaching POE.

*c. Notification.* The Department Head discusses teaching obligations with each faculty member. Faculty members should be notified in writing at the end of each academic year regarding their teaching obligation for the subsequent year, particularly where assigned courses depart from prior year assignments. Although unusual and avoided whenever possible, teaching obligations may be modified after notification based on faculty leaves, illnesses, etc. that change the department's overall ability to cover required courses. Any such changes will be negotiated with the faculty member, Department Head, and chair(s) of the appropriate committee(s).

*d. NTT Faculty.* Non-tenure track faculty workload policy is set by the collective bargaining agreement. Non-tenure track faculty teaching assignments are made by the Department Head (jointly where appropriate committees are utilized).

*e. Recordkeeping.* The Department Head keeps a record of the teaching load of each faculty member along with the justification for teaching above or below the standard level. Inter-year teaching load agreements are recorded in writing and maintained in Department files. Inter-year teaching load transfers more than three years old are not allowed. Records are maintained to satisfy teaching audits and to justify the department's position on issues such as teaching load and position retention.

## *ii. Extension Instruction*

*a. Expectations.* Faculty members with MSUE and MAES appointments and at Research Centers are expected to contribute to the off-campus instruction and outreach mission of the College of Agriculture. The College considers off-campus instruction load relative to assignment, evaluations, peer-reviews, and other relevant feedback in evaluating teaching activities. The primary teaching function of faculty with MSUE appointments is off-campus instruction. Therefore, MSUE faculty members are expected to provide a high proportion of the outreach education provided by the College of Agriculture. Off-campus instruction activities are explicitly considered when evaluating the teaching performance of faculty with College, MAES and MSUE appointments.

## 2. Alternative modes of teaching

The College of Agriculture takes its responsibility to alternate forms of teaching, such as advising and mentoring undergraduate and graduate students, very seriously. It is important to provide students with advice regarding course sequencing, departmental policies on prerequisites, optimal scheduling of

classes, and course load difficulty. Quality advising and mentoring improves student educational experiences and opportunities, contributes to recruitment and retention of majors, expands post-graduation opportunities, and generates a positive reputation. Undergraduate and graduate student advising and mentoring is considered teaching to the College of Agriculture. Faculty with College and MAES appointments are expected to contribute to advising.

*i. Undergraduate Student Advising Load and Expectations*

The faculty advising load for a department is based primarily on the number of majors. Advising responsibilities are split according to departmental priorities and workload policy. Advising equivalences will be made in accordance with effort as delineated in the department's workload plan.

*a. Advisor/Student Meetings.* Advisees are required to meet with their faculty advisor each semester. This meeting is designed to facilitate course scheduling, highlight any changes in student goals or course requirements, and provide career counseling. At this meeting, advisees should be provided with their registration access code or an advising evaluation that may be submitted for the registration access code once completed.

*b. Student Surveys and Interviews.* College of Agriculture departments are encouraged to conduct entrance surveys, advisor evaluations, and/or exit interviews. This provides an opportunity for feedback, placement questions, and evaluation of advising effectiveness.

*c. Undergraduate Student Notification* The departmental administrative associate tasked with student success coordination will notify each faculty member of their advising load each year.

*ii Mentoring Undergraduate Students in Scholarly Activities* Qualified faculty have a responsibility to mentor undergraduate students in scholarly activities. Equivalences for undergraduate student scholarly activities will be made in accordance with effort as delineated in the department's workload plan. The departments must provide appropriate and adequate opportunity in each program for undergraduate scholarly activities; consequently, faculty workloads must be sufficient to provide these opportunities. Faculty should encourage students to enroll in the appropriate department 490 Undergraduate Research or 492 Independent Study course for at least one semester of their scholarly activity.

*iii Mentoring Undergraduate Students in Internships* Faculty have a responsibility to determine quality of undergraduate internships and assess student performance in undergraduate internships. Equivalences for undergraduate student internships will be made in accordance with effort as delineated in the department's workload plan. For programs that offer internships and in particular where they are required, the departments must provide internship oversight; consequently, faculty workloads must be sufficient to provide this oversight. Students must be enrolled in the appropriate department 498 Internship.

*ivi. Graduate Student Advising Load* Qualified faculty have a responsibility to mentor graduate students. The College of Agriculture recognizes that in order to strive for a viable and quality graduate program, graduate student numbers per faculty should be defined by the discipline. Equivalences for advising and mentoring graduate students will be made in accordance with effort as delineated in the department's workload plan and defined by the nature of the discipline.

*3. Teaching Load Changes.* Changes, increases or reductions, in teaching assignment may be considered because of other responsibilities; e.g. administrative assignment, departmental curricular changes. All changes are subject to approval by the faculty, department head, and dean, with appropriate adjustment to POE. Any consideration of teaching load changes should recognize the importance of balancing curricular needs of the department with the reasons for a change in teaching assignment. Increases in teaching load should be contingent on teaching evaluations that meet or exceed departmental standards.

#### **G. Scholarship/Discovery**

The College of Agriculture recognizes and rewards various activities of a faculty member's scholarly program. Scholarship output is judged relative to an individual's appointment. Scholarship by faculty with MAES appointments is judged, in part, on its relevance and contribution to the MAES mission. Scholarship by faculty with MSUE appointments is judged in part on its relevance and contribution to the MSUE mission. Scholarship performance indicators, weighting, and expectations are outlined in each of the department's Role & Scope.

#### **H. Service/Outreach**

The College of Agriculture recognizes the importance of service/outreach as part of each faculty member's responsibilities. The service performance indicators, weighting, and expectations are outlined in each department's Role & Scope. All faculty are expected to attend department and college general faculty meetings. All tenure track faculty should be using Activity Insight for logging their professional activities and self-assessment report in the annual review process. All tenure track faculty members should be participating in the activities of the College and University including service on committees, working groups, task forces, etc.

This Workload Plan may be revised at any time and shall be reviewed to determine if revisions are necessary for a program review or accreditation process in the college. Any revisions to the College's Workload Plan shall be submitted in writing to the College of Agriculture Dean.