REPORT OF THE JOINT WORKLOAD COMMITTEE

May 1, 2023

Prepared for:
The University of Saskatchewan Faculty Association (USFA)
and
The University of Saskatchewan

By:

USFA Representatives
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Overview

As part of the December 2020 agreement to extend the 2017-2022 Collective Agreement, the Employer and the Faculty Association established a Joint Workload Committee. The primary mandate of this Committee was twofold: (1) to gather information about workload from the Employer and Association members across campus; and (2) to use the analysis of this information to make recommendations for procedures, criteria, and mechanisms that could be put in place to address workload concerns. The Committee's original deadline for reporting back, which was March 31, 2023, was extended at the request of employer representatives to May 1, 2023.

The Committee has six members. Three representatives from the Employer: Dean of Engineering S. Kresta (Employer Co-Chair), Dean of Nursing S. Richter, Interim Vice-Dean Faculty Relations Arts & Science J. Blakley, and three from the Association: P. Downe, Archaeology & Anthropology (USFA Co-Chair); E. Quinlan, Sociology; D. Parker, Small Animal Clinical Sciences. USFA Member Service Officer Johanne Brassard supported the work of Association representatives and Elyse Lafonde supported the work of the Employer Representatives.

The Committee met every month except for May through August 2022. The timeline of the activities undertaken by the Committee members is listed below.

A. Activities of USFA Representatives
- June 2022 - Focus Groups with FARs (Downe, Parker, Quinlan, support: Brassard)
- June 2022 - Focus Groups with Department Heads (Downe, Parker, Quinlan, support: Brassard)
- August 2022 – Initial Information Request to Employer (Downe)
- October 2022 – Second Information Request to Employer (Downe)
- November 2022 – December 2021 – Questionnaire Development (Downe, Parker, and Quinlan, support: Brassard)
- December 2022 – Assignment of Duties Analysis Template Development (Downe, Parker, and Quinlan, support: Brassard)
- December 2022 – Questionnaire Pre-Test (Downe)
- January 2023 – Third Information Request to Employer (Downe)
- January 2023 – March 2023 Questionnaire Distribution and Analysis (Downe, special contributions by K. Lawson; Support: Brassard)
- January 2023 – Consultation with Shelley Paewai, Massey University, NZ (Quinlan, Parker, Support: Brassard)
- January 2023 – Development of Principles to Guide the Allocation of Faculty Workload (Quinlan, Downe, Parker, Support: Brassard)
- March 2023 – Completion of Assignment of Duties Analysis (Quinlan, Downe, Parker, Support: Brassard)
- March 2023 – Completion of Literature Review (Quinlan)
- April 2023 – Completion of Recommendations (Downe, Quinlan, Parker, Support: Brassard)
- April 2023 – Completion of the USFA Representatives' Section of the Report (Downe, Parker, Quinlan, Support: Brassard)

B. Activities of Employer Representatives
- October 2022 – Vice-Provost Mary Buhr makes Assignment of Duties request to Deans
- January 2023 – E-mail sent to Deans for information regarding faculty workload (Blakely, Kresta, Richter, Support: Lalonde)

- January-March 2023 – Assignment of Duties documents shared with USFA. Contents analysed for common characteristics by the VPFR office. A summary report was shared with USFA.
- February 2023 – E-mails from Deans received and analyzed (Blakely, Kresta, Richter, Support: Lalonde)
- March 2023 - Lessons learned from navigating new assignment of duties processes in the Faculty of Nursing summarized by Solina Richter.
- March 2023 – Final Report preparation
- April 19, 2023 – Final report shared with USFA in the last meeting of the working group. Questions arising from this discussion are included in the final report.

Executive Summary of USFA Representatives Report

The USFA Representatives undertook four main activities to collect sufficient information to draw substantive recommendations regarding faculty workload issues:

1. Literature Review and Consultation with Researchers – USask is not the only university that identifies workload concerns of faculty as a major concern. We therefore gathered information about what has been in the past, and is currently being done, at other post-secondary education institutions across and beyond North America to identify and redress workload "pain points."
2. We conducted two 90-minute focus groups – one with Department Heads and one with Faculty Association Representatives – to establish a preliminary list of the criteria, procedures, and concerns related to workload across campus.
3. We analyzed all Assignment of Duties documents made available to us (48 in total) to ascertain the extent to which they include statements related to: (a) equity in duties; (b) typical teaching and/or clinical duties; (c) teaching releases for administrative/service/outreach duties; (d) other teaching accommodations; (e) discipline-specific expectations (such as professional licensing, skills, etc.); (f) balance across the range of duties (such as "40-40-20" allocation of time across teaching, RSAW, and administration); (g) tenure and promotion standards; (h) accommodation for stage of career; and (h) Article 11 in the Collective Agreement.
4. We surveyed the 1,005 in-scope faculty members to collect information on workload. A total of 383 completed questionnaires were submitted, representing a response rate of 38%. The questionnaire included standardized USFA demographic questions, five limited answer questions regarding hours of work, 32 statements that respondents were asked to rank on a five-point Likert scale, and one open-ended question.

From this work, we identified eight principles that should guide the allocation of faculty workload at the University of Saskatchewan: Equity, Transparency, Reasonableness, Balance, Safety, Clarity of Responsibilities, Acceptability, and Shared Commitment. These principles reflect best practices we found in the literature, workload concerns of University of Saskatchewan faculty emerging from focus groups and questionnaire data, as well as the revisions that we identify are needed to the Assignment of Duties (AoD) procedures.

Results from the Literature Review on Faculty Workload

Relevant scholarly databases were searched for theoretical and empirical literature on faculty workload. The results were augmented with articles retrieved through citation analysis with reports and policy documents found from grey literature searches. After iterative screening, 28 sources were retained and analyzed. Themes emerging from the analysis include the decades-long trend of expanding workloads of faculty in many countries around the globe. As the core activities of teaching, research,

and service have become more demanding, faculty are finding it difficult to meet their responsibilities in the three areas of the work. From our review of the literature and consultation with academic staff involved in long-term workload reform at other institutions, we concluded that the development and implementation of policy and processes related to workload reform requires a protracted timeframe and major commitment to institutional changes across all units and levels of the university. Dedicating time and institutional resources to the process of reform have proven to be necessary conditions for successful reform efforts.

Analysis of Assignment of Duties Guidelines

Our systematic review of AoD guidelines gave rise to four recommendations, including one recommendation that indicates eight ways in which those procedures should be revised. Overall, a more holistic mechanism to the management and assignment of duties is needed in order to account for the full range of activities that constitute faculty work. We are particularly concerned with the misalignment between the AoD guidelines and the standards for career advancement (renewal of probation, tenure, and promotion) as well as salary review as well as AoD guidelines that violate Article 11 of the Collective Agreement. There is a need for greater integration and complementarity of these processes.

Results of the Focus Groups with Department Heads and Faculty Association Representatives (FARs)

The two focus groups with Department Heads and Faculty Association Representatives indicated that the teaching and supervisory duties of faculty in the context of reduced resources and declining faculty complements are of particular concern. Three major drivers of unsustainable workloads were identified: inequity across comparable units, inadequate support for faculty members' research, scholarly, and artistic work (RSAW), as well as the ballooning of clerical and administrative tasks required of faculty members. The participants in the focus groups identified two main barriers to addressing the workload issues effectively: (a) little to no recognition of the full range of work involved in the faculty's fulfillment of their duties, and (b) a lack of recognition of faculty work by College/School leaders. A total of nine recommendations for how best to address the concerns raised in the focus groups are offered, including the need to develop a clear standard for what constitutes a 'reasonable' workload.

Results from the Faculty Workload Survey

Over 1,000 faculty members were surveyed in January 2023, and the response rate was 40%. Responses to the 33 Likert scale questions were analyzed for means, frequencies, and associations using SPSS. The 155 responses to the one open-ended question were coded for content in three rounds of coding. Faculty members report working in excess of 50 hours per week, including working evenings and weekends in order to accomplish all that is required of them. Faculty respondents indicate that their workloads have escalated by the reductions in faculty complement and there is a noticeable increase in work-related stress. Many faculty members feel pressure to increase their workloads to maintain a positive experience for students. The pattern of responses reflected faculty's dissatisfaction with Concur and Connection Point and with the time spent on clerical tasks. Respondents do not perceive that there is a clear process for addressing workplace concerns or inequitable assignments of duties, or that senior administrators are concerned about faculty workload issues. Eleven themes emerged form the analysis of the responses to the open-ended question. The four strongest themes, representing the majority of responses were (a) the increase in administrative/clerical work (which is broken down into five sub-themes), (b) the effect of morale and work environment, (c) the increase in student- and teaching-loads, and (d) inequitable assignments of duties. A total of seven recommendations for how best to address the faculty workload concerns are provided, including the need to develop and implement mechanisms to reduce the clerical/administrative tasks required of faculty.

Final Recommendations

In Part VII of our section of the report, we provide a summary of the 20 recommendations that emerged from our work. To meet the mandate of the Committee as set out in the Memorandum of Agreement 9 of the Collective Agreement, we categorize the recommendations in relation to the Criteria, Procedures, and Mechanisms of Faculty Workload. There is one over-arching recommendation that speaks to the need for an ongoing Workload Committee. Two recommendations reference the criteria for workload management; nine recommendations relate to workload-specific procedures; and eight recommendations speak directly to the need to implement and revise mechanisms to redress workload excess and imbalance.

The USFA Representatives on the Committee shared routine updates of all the activities and results during Committee meetings. Our updates were prepared ahead of time and each presentation was 30 to 35 minutes in length. The USFA section of the report contains no additional information than that which was shared during the meetings.

Executive Summary of Employer Representatives Report

USFA has yet to share their full report with the employer representatives, so we do not have the benefit of reviewing and responding to their recommendations or findings in any detail.

1. Both sides prepared principles for assignment of duties processes. There is some overlap in these principles, including a clear concern for early career faculty and their development. Our report (a total of 11 pages) includes short but substantive discussions of challenges in workload assignment, principled approaches to equitable workloads, key messages from the assignment of duties documents, and extensive commentary on perspectives gained from deans.
2. A definition of workload which differentiates the kinds of work taken on by faculty members was central to our discussion. There are many places where workload could be significantly reduced by changes in governance which would reduce the burden on all members of our community. Reduction in program offerings in response to reduced enrollment or reductions in faculty complement is another area where workload reductions could be significant but may be vigorously opposed by academic units. A third area of concern for the employer representatives was finding a balance between holding USFA members accountable for delivery on the university's mandate for teaching, research, collegial governance, and the public good with protecting their freedom to set a vision and to prioritize different parts of their role.
3. The current state of over-governance at this institution is particularly harmful to small units and early career faculty. We urge streamlining this area and consideration of a model which would reduce the number of small units on campus. This would reduce workloads for all members of our community.
4. Vacation entitlement at USask is 30 days a year. All other U15's for which data was available identify one month (22 or 25 days) vacation entitlement.
5. There was no evidence of creep in 3CU equivalent courses taught per USFA FTE employee over a 5-year period. The current campus-wide average of 2.13 3CU equivalents/FTE is lower than a normative level of 2.57. The number of students per FTE at USask is 27.7 (graduate+undergraduate) leaving significant room for increases in enrollment before a financially sustainable level of 30 students per FTE is reached.

6. For the majority of academics, the freedom to define how they spend a significant portion of their working hours, the freedom to define a strategic focus, and their autonomy in prioritizing activities is a central part of the value we can offer as an employer. This freedom to set a vision and prioritize different parts of the role is something we want to protect. Over governance and specificity in the assignment of duties is seen has having significant additional workload implications and as introducing significant risk in the form of further incursions on academic freedom.

PART 1

REPORT OF THE USFA REPRESENTATIVES ON THE JOINT WORKLOAD COMMITTEE

Pamela Downe, Dennilyn Parker, Elizabeth Quinlan

April 30, 2023

I. Introduction

The Joint Workload Committee was formed to meet the mandate established by Memorandum of Agreement 9 in the Collective agreement. The USFA Executive had been made acutely aware of faculty members' concerns about increasing workloads because of USask's declining faculty complement, increasing student enrolments, shrinking resources to support research and teaching, and expanding expectations for graduate student and postdoctoral supervision as well as research intensity. With the enhancements to the Targeted Retirement Incentives in Appendix 2 of the Collective Agreement and the new Article 24.6, the USFA Executive team heard from faculty members whose concerns were two-fold. First, those faculty members who were eligible for, and seriously considering retirement were worried that their departure would negatively affect the workload of remaining faculty and, by extension, the student and program success in their home units. Second, the implications of a decreased faculty complement were – and remain – very distressing to USFA members who know that more work will fall to them as a result. USFA members expressed concern that this would, in turn, affect the workplace environment as well as their ability to balance the full range of duties effectively, to maintain research productivity, and to meet the standards for career progression.

The concerns that were, and continue to be raised with the USFA reflect the fact that our faculty complement has drastically decreased over the past decade. At the same time, enrolments have continued to climb. *The faculty complement has reduced by 11% while enrolments increased by 8% in the last 10 years. More alarming is the 15% reduction of Tenure-Track and Continuing Status faculty while the precarious Without Term faculty have increased by 467% in that same ten-year period.*[1]

In this context, the USFA representatives to the Workload Committee collected information to understand more fully the extent and nature of workload concerns among faculty members. We did that through four main activities.

1. We undertook a literature search to explore how workload issues have been identified at other universities and what principles and processes have guided institutional responses to them. We consulted with researchers whose work was based in institutions similar to the University of Saskatchewan.
2. We conducted two 90-minute focus groups – one with Department Heads and one with Faculty Association Representatives – to establish a preliminary list of the criteria, procedures, and concerns related to workload across campus.
3. We analyzed all Assignment of Duties documents to ascertain the extent to which they include statements related to: (a) equity in duties; (b) typical teaching and/or clinical duties; (c) teaching releases for administrative/service/outreach duties; (d) other teaching accommodations; (e) discipline-specific expectations (such as professional licensing, skills, etc.); (f) balance across the range of duties (such as "40-40-20" allocation of time across teaching, RSAW, and administration); (g) tenure and promotion standards; (h) accommodation for stage of career; and (h) Article 11 in the Collective Agreement.

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[1] In October 2013, there were 1,099 active USFA members (i.e. not on LTD or unpaid leave). In October 2022, there were 975, a reduction of 11% in the past decade. As of March 2023, the date of report-writing, faculty complement is down to 949. Tenure Track and Continuing Status faculty has reduced from 1012 to 858; Without Term faculty have increased from 12 to 68 over the past decade.
(Sources: USFA membership records; https://leadership.usask.ca/priorities/reports/enrolment.php#StudentHeadcount)

4. We surveyed the 1005 in-scope faculty members to collect information on workload. A total of 383 completed questionnaires were submitted, representing a response rate of 38%. The questionnaire included standardized USFA demographic questions, five limited answer questions regarding hours of work, 32 statements that respondents were asked to rank on a five-point Likert scale, and one open-ended question.

In the sections that follow, we present the results of these four components of our work. We highlight recommendations for the criteria, procedures, and mechanisms related to workload that stem directly from each of these components. We then provide an overall list of all these recommendations in the conclusion of our report.

<h2 style="text-align:center">II. Eight Principles Underpinning Allocation of Faculty Workload</h2>

Equity

Workloads should be equitable, but not necessarily equal. The *Equity* principle acknowledges that faculty members are in a variety of positions and at different stages in their careers, have different career objectives, and contribute to the university in diverse ways. In line with the *Equity* principle draws attention to the implementation of EDI priorities and consideration of the full range of work activities of academic faculty.

Research demonstrates that workload inequities accrue over time.[3] For instance, faculty from minority groups are often disproportionately called up to lead diversity and inclusion initiatives that are not fully recognized in reward structures and workload allocation. Women faculty tend to spend greater amount of time on teaching and service activities and less time on research than their male counterparts[4]. Such differences in workload might appear small in any given year, but over time they accumulate and lead to workload inequities, producing among other things negative consequences for career advancement. In subtle ways the structures and cultures of faculty work reproduce and normalize workload inequities over time. Given the temporal patterning of workload inequities, the *Equity* principle suggests that all new initiatives or changes in academic procedures should be fairly and properly considered in relation to their impact on workloads.

Transparency

The procedures and processes of workload allocation should be clear and open to scrutiny. The *Transparency* principle dovetails with the *Equity* principle: equity not only has to be pursued, it has to be seen to be pursued. Academic units need procedures and protocols to make visible how faculty receive credit for the full range of their work activities.

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[3] American Council of Educators (2022). *Equity-Minded Faculty Workloads.*
https://www.acenet.edu/Documents/Equity-Minded-Faculty-Workloads.pdf

[4] Todd, Z., Madill, A., Shaw, N., & Brown, N. (2008). Faculty members' perceptions of how academic work is evaluated: Similarities and differences by gender. *Sex Roles*, 59(11), 765-775.

Research shows that many faculty do not know how much work is expected, in what areas, and what happens if the work is not completed.[5] Opaque systems tend to foster lack of trust and perceptions of inequities, even though the actual workload allocations might be equitable. Transparency of procedures can foster an environment in which current inequities in workload allocations are tolerated in the belief that eventually current inequities will be redressed.[6]

Reasonableness

Workloads should be reasonable so faculty can carry out their duties and responsibilities effectively and maintain a balance between their professional and personal lives. The *Reasonableness* principle recognizes the flexible nature of academic work but also acknowledges that if workloads are not reasonable, faculty's work is less effective.

Balance

Workloads should be distributed to allow faculty to achieve the appropriate balance of duties as defined by their position. The *Balance* principle complements both the *Equity* and *Reasonableness* principles and is articulated by the CAUT Statement on the Nature of Academic Work: "*in the assignment of duties, care must be taken to ensure that the balance among research, teaching and service activities as well as the balance between scheduled and non-scheduled duties affords adequate opportunity for every academics member to participate fully in all aspects of academic work.*"[7]

Research indicates that issues related to faculty workload are more than a matter of load limits: they also entail what sort of work will be loaded and in what proportion.[8]

Safety

Workload should be allocated to promote the safety and wellbeing and minimize the hazards which could cause physical or mental harm. The *Safety* principle coordinates with the *Reasonableness* principle. If workloads are not reasonable, the health and safety of faculty, as well as that of students, can be severely compromised with potential for devastating consequences to both individual and institution. The principle recognizes the University has faculty working and supervising large groups of students in labs with explosives and other highly dangerous materials, and in settings where there is a risk of harm.

Clarity of Responsibilities

Roles and responsibilities need to be clearly defined in all procedural documents related to allocation of faculty workload. The *Clarity of Responsibilities* principle complements the *Transparency* principle.

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[5] American Council of Educators (2022). *Equity-Minded Faculty Workloads.*
https://www.acenet.edu/Documents/Equity-Minded-Faculty-Workloads.pdf
[6] Burgess, T., Lewis, H., and Mobbs, T. (2003). Academic workload planning revisited. *Higher Education, 46,* 215-233.
[7] Canadian Association of University Teachers. (2016). *The Nature of Academic Work.* CAUT Policy Statement.
https://www.caut.ca/about-us/caut-policy/lists/caut-policy-statements/policy-statement-on-the-nature-of-academic-work
[8] Lustig, J. (2002). Treadmill to oblivion?: The coming conflict over academic workload. *NEA Higher Education Journal,* 115-128.

Acceptability

Workload allocations should support the expertise, capabilities, and career priorities of individual faculty at the same time as supporting academic units' delivery of programs and pursuit of strategic goals. The *Acceptability* principle recognizes that an assigned duty can also be an individuals' life passions. The *Acceptability* principle also acknowledges that academic cultures have an established tradition of autonomy and freedom for faculty to pursue and disseminate knowledge.

Shared Commitment

The above-stated seven principles should be shared by both faculty and institutional leaders. Faculty's time is among the most vital resource available to our university, so how to best utilize the resource is something that all institutional actors have a shared interest in. Faculty workloads that do not accord with the above principles have institutional consequences, including lower productivity, compromised recruitment, and decreased retention. The *Shared Commitment* principle recognizes negotiation and interpretation are inherent human functions entailed in representing and measuring workload.

Research indicates that there is a danger in focusing only on the technical, algorithmic aspect of allocation of faculty workload, to the detriment of the social dimension of system design.[9] Averting such dangers requires faculty and administrators alike to be active contributors to the development and refinement of systems of workload allocation.

III. Faculty Workload: Literature Review

The literature on faculty workload reflects a multiplicity of perspectives from the applied disciplines of Education, Business, Public Administration and Social Work through to theoretical disciplines such as Sociology and Psychology. Four search strategies were used to find literature the workload of faculty in all types of post-secondary educational institutions in all countries: 1) an aggregate search of scholarly databases that target above-mentioned theoretical and applied disciplines; 3) a citation analysis of key sources to retrieve articles citing those key sources; 4) grey literature search to retrieve reports and policy documents of faculty professional associations (e.g. American Council on Education). After screening for relevance, After iterative screening, 28 articles were retained and the following components of each were extracted and synthesized: purpose of study; characteristics of studied faculty and institution(s); theoretical framework; methods (if empirical study); findings. The synthesis results are summarized below.

Faculty workload in the changing higher education system

The post-war decades are marked by an expansion of higher education in north America and in many other around the globe. Coincident with the expansion have been calls from governments and communities alike for efficiency and accountability in all areas of academic operations. Increasingly, institutions of higher education are required to demonstrate 'value for money'. Public scrutiny, combined with widespread resource constraints, has led institutions to evaluate faculty work and

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[9] Burgess, T., Lewis, H., and Mobbs, T. (2003). Academic workload planning revisited. *Higher Education, 46,* 215-233.

workloads.[10] Because faculty salaries are a major expenditure for most universities, workload allocation is an obvious cornerstone in public accountability of post-secondary education.[11] Perhaps not surprisingly, workload allocation has been a factor in recent contract negotiations and collective agreements between faculty and university administrations.[12]

A significant aspect of the expansion in the higher education system is the increased student populations and their changing compositions. The disproportionate increase of student populations relative to instructional staff is a global trend.[13] Furthermore, universities have widened access by admitting more students with non-standard entry requirements. Overall, faculty support institutional initiatives to increase access to higher education for equity-seeking student groups and to diversify teaching methods to accommodate specialized needs.[14] However, the larger intakes, along with an increased variation in student needs, have added to the demands on the skills of the professoriate. The requirement to develop and apply new flexible teaching and learning strategies has only been exacerbated by the recent COVID pandemic. Survey results of UofS faculty shows that COVID has disproportionately affected the lives and careers of women faculty, which makes reforms to workload allocations more critical than ever.[15]

Even before the pandemic academics were reporting difficulty in maintaining the quality of their teaching.[16] Despite the massification of higher education, the reputations of universities, particularly the top-tier universities, continue to be based on research performance. Faculty working in research-intensive universities are under increasing pressure to pursue external funding for their research programs.[17] The introduction of new technology is another transformation in higher education systems that has led to intensification of the work of academic faculty.[18] Finally, the trend towards causualization of the academic workforce has also amplified faculty work: larger proportions of contingent, non-tenurable staff have left a reduced the pool of regular faculty to carry out the student advising, duties related collegial self-governance, and other service functions.[19]

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[10] ibid.

[11] Ibid.

[12] The recent settlement of the faculty strike at Concordia University in Edmonton included a 25% reduction in the annual instructional loads for teaching faculty. https://aufa.ca/blog/2022/1/25/concordia-strike-ends-in-faculty-victory.

[13] Bentley, P. and Kyvik, S. (2012). Academic work from a comparative perspective: A survey of faculty working time across 13 countries. *Higher Education, 63,* 529-547.

[14] Adams, D., (1998). Examining the fabric of academic life: An analysis of three decades of research on the perceptions of Australian academic about their roles. *Higher Education, 36,* 421-435.

[15] Walsworth, S. (2021). *Working from Home During the Pandemic.* Report to USFA.

[16] McInnis, C. (2000). Changing academic work roles: The everyday realities challenging the quality of teaching. *Quality in Higher Education, 6* (2). 143-152.

[17] Gillespie, N., Walsh, M., Winefield, A., Dua, J. and Stough, C. (2001). Occupational stress in universities: Staff perceptions of the causes, consequences and moderators of stress. *Work and Stress, 15.* 53-72.

[18] Polly, D., Martin, F. and Guilbaud, T.C. (2021). Examining barriers and desired supports to increase faculty members' use of digital technologies: Perspectives of faculty, staff and administrators. *Journal of Computing in Higher Education, 33.* 135–156.

[19] Lustig, J. (2002). Treadmill to oblivion?: The coming conflict over academic workload. *NEA Higher Education Journal,* 115-128.

What faculty say about their workloads

Universities are among the few organizations focused on the dual functions of knowledge production and knowledge dissemination through teaching and research.[20] Faculty's work is directed to these primary functions combined with service to the institution, apportioned across the three types of duties. Research shows that faculty enjoy intrinsic rewards from their work: the satisfaction of achieving excellence in their research, responding to student needs and expectations in their teaching, and participating in collegial decision-making[21] These intrinsic rewards are more forceful motivators for academics than extrinsic factors such as salary. Faculty value their autonomy to pursue original work and the opportunities to contribute to the creation and distribution of knowledge. Ranking highly in academics' satisfaction is their freedom to choose how and when to pursue their research interests, expressed in various terms such as flexibility, independence, and professional judgement.[22] Yet, research demonstrates that faculty are finding it difficult to meet their responsibilities in teaching, research, and service, as each component of these core activities has become more demanding, as described above.[23] Academics report being unable to maintain the quality of their teaching.[24] Others proclaim their difficulty in actively engaging in research because of heavy workloads and time constraints.[25] Still others note that activities producing the greatest increase in their working hours are the development of course materials for new technologies and the provision of academic support, dubbed 'pastoral care', for students despite the professionalization of student support services.[26] In general, academics report they regularly undertake more of their work during evenings and weekends in order to cope with demands of the job.[27]

Overlapping with the research on faculty workload is exploration of faculty burnout, first appearing in the literature in 1987.[28] Burnout among academics far exceeds that of other groups of workers in public and private sector[29] and infringes on the wellbeing of individual faculty, but also universities since the achievement of institutional goals heavily depends a dedicated, healthy workforce.

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[20] Romainville, M. (1996). Teaching and research at university: A difficult pairing. *Higher Education Management, 8.* 135-144.

[21] Adams, D., (1998). Examining the fabric of academic life: An analysis of three decades of research on the perceptions of Australian academic about their roles. *Higher Education, 36,* 421-435.

[22] The Chronicle of Higher Education. (1996). *Faculty attitudes and characteristics: Results of a 1995-96 survey*, A14-A15.

[23] Gillespie, N., Walsh, M., Winefield, A., Dua, J. and Stough, C. (2001). Occupational stress in universities: Staff perceptions of the causes, consequences and moderators of stress. *Work and Stress, 15*. 53-72.

[24] McInnis, C. (2000). Changing academic work roles: The everyday realities challenging the quality of teaching. *Quality in Higher Education, 6* (2). 143-152.

[25] Rajkaran, S., & Mammen, K. J. (2012). Establishing performance indicators for university academics through a consensus-based approach: A South African case study. *Journal of Social Sciences*, 30(2), 127-135.

[26] McInnis, C. (2000). Changing academic work roles: The everyday realities challenging the quality of teaching. *Quality in Higher Education, 6* (2). 143-152.

[27] Kinman, G. and Jones, F. (2004). *Working to the Limit.* London: Association of University Teachers.

[28] Todd-Mancillas, W., Johnson, P. (1987). Academic burnout: One perspective. Paper presented at the Annua Conference on Communication Therapy. Illinois.

[29] Lackritz, J. (2004). Exploring burnout among university faculty: Incidence, performance and demographic issues. *Teaching and Teacher Education, 20*. 713-729.

Workload related to administrative duties in particular is a leading cause of faculty burnout.[30] However, burnout also significantly correlates with the numbers of students taught, both graduate and undergraduate. [31]

Working time

Issues related to faculty workload are more than a matter of working hours and load limits. Also entailed is what type of work will be loaded and who is responsible for managing its execution.[32] However, we might ask if the changing expectations and greater demands on the professoriate in their teaching, research, and service necessarily mean that they are working longer hours? Some researchers suggest that faculty's weekly hours of work have not increased because they cannot really increase by much more; rather, the balance of the average faculty's workload has changed with increased amount of time spent on administrative functions making it difficult to pay as much attention to teaching and research.[33] Research aimed at identifying longitudinal trends in faculty's working hours face the challenge of the complexity of the nature of academic work that make it difficult to parse into hours, which results in incomparability of methodological and definitional variations. Consequently, the research results on faculty working hours are mixed.

While trends in working hours are inconclusive, clear patterns in working time of academic faculty by demographics, career path, and institutional factors are well-established.[34] For instance, women spend more time on teaching and less time on research in comparison to their male counterparts.[35] And, fully promoted faculty tend to increase their time on service, whereas long-term associate professors spend more time on teaching at the expense of research.[36] Workloads differ significantly across countries, which illustrates the influence of national traditions in higher education on academic work.[37] There is significant variation across Asian and Latin America countries. Patterns tend to be similar in English-speaking countries, to a lesser extent in Western Europe. Norwegian countries

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[30] Eker, M. and Anbar, A. (2008). Work-related factors that affect burnout among accounting and finance academics. *The Journal of Industrial Relations and Human Resources, 10* (4). 110-137.

[31] Gillespie, N., Walsh, M., Winefield, A., Dua, J. and Stough, C. (2001). Occupational stress in universities: Staff perceptions of the causes, consequences and moderators of stress. *Work and Stress, 15*. 53-72.

[32] Lustig, J. (2002). Treadmill to oblivion?: The coming conflict over academic workload. *NEA Higher Education Journal,* 115-128.

[33] Tight, M. (2010). Are academic workloads increasing? The post-war survey evidence in the UK. *Higher Education Quarterly, 64,* (2), 200-215.

[34] Link, A., Swan, C. and Bozeman, B. (2008). A time allocation study of university faculty. *Economics of Education Review, 27.* 363-374.

[35] Winslow, S., (2010). Gender inequality and time allocations among academic faculty. *Gender & Society, 24* (6). 769-793.

[36] Link, A., Swan, C. and Bozeman, B. (2008). A time allocation study of university faculty. *Economics of Education Review, 27.* 363-374.

[37] Bentley, P. and Kyvik, S. (2012). Academic work from a comparative perspective: A survey of faculty working time across 13 countries. *Higher Education, 63,* 529-547.

appear to be an anomaly with a decrease in faculty's working time, explained by the changing attitudes towards work-life balance among younger cohorts.[38]

Systems of workload allocation

Workload allocation, and the broader array of planning procedures, accomplish the important task of balancing load against capacity to achieve the strategic aims of academic units within the institution. Strategic goals influence the operational decisions in workload allocations. For instance, a goal of maximizing student choice of courses would allow for faculty to teach low-enrolment courses that might not 'pay for themselves' in the short-term but protect the demand for the program in the long-term.[39]

From a central management perspective, a high degree of standardization across academic units in workload allocation procedures has some utility. However, the diverse nature of work performed by faculty poses operational challenges to standardizing allocation procedures. Clinical teaching and research in particular is often perceived as incommensurate with other subject areas. And, even with the subject areas of humanities or the sciences, each discipline has its distinct intellectual traditions and cultural norms related to faculty work. Variability is not necessarily indicative of a dysfunctional system of workload allocation, but rather can be exhibitive of accommodation of the diverse nature of academic work and healthy democratic organizational regimes that productively create innovation at the unit level.[40]

Systems of workload allocation differ on a number of dimensions, including:
- o temporal focus: whether the system is prospective and looks to the future or focused on reporting what has happened or is happening currently;
- o extent and manner of linkages of allocation system to institutional budgeting;
- o autocratic or democratic: extent to which the system works 'top-down' versus 'bottom-up';
- o breadth and integration of work considered: teaching is a basic component in most systems of workload allocation, even in those institutions that are research-intensive. While some systems focus solely on teaching, others include teaching along with research and service duties; systems that include all three elements of faculty work integrate the elements but to different degrees;
- o the extent of detail of the work considered: hidden subsidies through students counts, repetition of courses prepared for and delivered in previous years, TA support, or simply the timing and location of teaching commitments can all raise challenges to the equity of workloads;
- o method of calculating workload: for example, working hours, enrolments, course counts. [41]

Reforming systems of workload allocation

As in any organizational change, managing change in workload allocation requires open dialogue and cooperation consideration of the structural relationships operating within the institution. Perceived

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[38] Kyvik, S. and Olsen, T. (2008). Does the aging of academics affect the research performance of universities? *Scientometrics, 76* (3). 439-455.
[39] Burgess, T., Lewis, H., and Mobbs, T. (2003). Academic workload planning revisited. *Higher Education, 46,* 215-233.
[40] Ibid.
[41] Ibid.

interference with core activities of teaching and research can be considered by academics as a detrimental deviation from the long-standing cultural norms and traditions of faculty autonomy.[42] If workload allocation reform is if it is seen by faculty as a tool of excessive managerial control, it can dampen the morale of faculty. On the positive side, workload allocation reform can improve morale if truly excessive workloads are properly flagged and dealt with as a proactive method of attending to the wellbeing of faculty. [43]

The development and implementation of policy and processes related to workload reform requires a protracted timeframe considering it is an issue that requires major commitment to institutional changes across all units and levels of the university. Dedicating time and institutional resources to the process of reform have proven to be necessary conditions for successful reform efforts.[44]

IV. Analysis of Assignment of Duties Guidelines

The 48 AoD guidelines supplied to the Committee were reviewed by the USFA representatives. We first developed a template to facilitate our extraction of the relevant elements from the AoDs documents:

- Equity principles explicitly stated,
- Typical teaching/clinical duties,
- Specified teaching releases for administrative duties,
- Specified Teaching releases for research activities,
- Other expectations (e.g. professional skills),
- Reference to balance across duties (e.g. 4/40/20),
- Reference to Standards for tenure & promotion,
- Accommodations for stage of career.

Then, for the purposes of triangulation, before proceeding with our individual reviews all USFA representatives reviewed the same 3 randomly selected AoDs using a draft template. We then met to discuss and calibrate our findings, from which the template was finalized. The remaining AoD documents were then divided equally among the three representatives.

The 48 reviewed AoD documents revealed considerable variation, reflecting, at least in part, the diversity of the type of work performed by the faculty within the units, intellectual traditions across disciplines, and size and leadership style of the unit heads. However, even in similar units in which faculty are performing similar work, there is variation in the specificity of the AoDs.

Three documents passing for AoDs are nothing more than a table for faculty to complete regarding their courses, student supervision, grants held, etc. (e.g. Geography & Planning, College of A&S;

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[42] Adams, D., (1998). Examining the fabric of academic life: An analysis of three decades of research on the perceptions of Australian academic about their roles. *Higher Education, 36,* 421-435.

[43] Burgess, T., Lewis, H., and Mobbs, T. (2003). Academic workload planning revisited. *Higher Education, 46,* 215-233.

[44] Paewai, S. R., Meyer, L. H., & Houston, D. J. (2007). Problem solving academic workloads management: A University Response 1. *Higher Education Quarterly*, 61(3), 375-390.

Educational Psychology & Special Education, College of Education; Pathology, WCVM). The remaining documents fall on a spectrum according to the extent of specificity. At the one end are those AoD guidelines with very little specification, leaving the allocations up to the unit head. The advantage of this approach is that can accommodate diverse information without introducing overcomplexity. Yet, such AoDs rely on the unit head's knowledge of all the intricacies of the work of all the unit's faculty and their ability and willingness to take them into account in the assignments. As well, workload inequities can easily arise in such units if there is inadequate consultation between unit head and individual faculty or a lack of agreed-upon definitions and norms established through discussions involving all the unit's faculty. In essence, AoDs with least specification are most subject to the biases that inevitably creep into subjective decision-making.

In the middle of the spectrum are the overwhelming majority of AoD guidelines that involves high level of consultation but also some degree of specification. Most commonly specified are teaching assignments, often quantified in terms of number of courses for the year, leaving research and service under-specified or not at all.

At the other end of the spectrum are the AoD guidelines that detail in assignments for the three core duties (e.g. Edwards School of Business, Law and Sociology). The advantage of this approach is the greater capacity to accommodate the intricacies of workloads, such as course enrolments, different modes of delivery. The disadvantage of this approach is while equality can be misinterpreted for equity since some aspects of workload are likely to be excluded from the algorithm simply because they are difficult to quantify – e.g. the number, methods and complexity of assessments of student work; the availability of teaching and research assistants and other resources; the location of teaching activities assigned; the size and degree of complexity of unit-wide duties or projects for which the member has specially assigned responsibilities; faculty's special circumstances, such as family responsibilities or disability, which may affect the scheduling of teaching activities.

⇨ Some balance on the spectrum is necessary since too little detail causes distrust whereas too much detail causes unrealistically fine-grain comparisons.
⇨ Guidelines that incorporate the full range of work activities have the greatest possibility of creating equitable workloads.

Explicit Statement of Equity Principles

Of the 48 reviewed AoD documents, 33 (69%) contain statements of equity principle, ranging from general statements such as "workloads might not be precisely equal" (Computer Science, College of A&S) to specific statements: for instance, the goal of the AoD is equitable and sustainable workloads (Psychology and Health Studies, College of A&S) and a rolling 5-year average of workloads is used to achieve equity (College of Law). Some units combine the equity principle with other principles such as Fairness, Reasonableness, and Transparency.

Typical Teaching/Clinical Duties

Similar to the proportion of the inclusion of equity principles, slightly more than two-thirds of the documents (69%, 33/48) indicate the unit's typical teaching and/or clinical duties. Types of specifications include:

- distinctions between undergraduate versus graduate courses (Biology, College of A&S; CBE and CGE, College of Engineering; Kinesiology; Law) or level of undergraduate courses (e.g. Physics, College of A&S).
- differential teaching loads depending on position type, e.g. lecturer/instructor, APA, primary-joint, secondary-joint (Johnson-Shoyoma School; APP, BMI and SORC, College of Medicine; SENS);
- graduate supervision included in teaching duties (e.g. Archeology & Anthropology, College of A&S; Educational Foundations, College of Education; APP, College of Medicine; Kinesiology; School of Public Health).
- a range of teaching duties depending on whether the faculty is 'research-intensive' (e.g 9 cu for research-active versus 15 cu for research-inactive faculty, Psychology & Health Studies, College of A&S; School of Public Health).

Specification of clinical duties range from no benchmarks given by most departments in College of Medicine and SACS, WCVM to the very specific equation of 1cu = 45 hours clinic/lab by College of Dentistry. Nursing is unique in equating 40% teaching to 624 working hours.

Teaching Releases for Administrative Duties

Only 27 of the 48 reviewed AoD documents (56%, 27/48) include a reference teaching release(s) for faculty who assume administrative positions of Department Heads, Assistant/Associate Department Heads, Graduate and Undergraduate Chairs, Herbarium Curator, Lab Manager, Director of Clinical Training, and Associate Dean, Dean in the case of colleges, and Assistant ED, Program Directors in the case of the schools. Of those that include a reference to teaching releases, approximately half specify amount of teaching release (e.g. 3 or 6 cu). In a contrasting approach, the College of Law adds administrative duties to faculty unable or unwilling to supervise grad student theses. The clinical units were especially lacking in this element of the AoDs.

Teaching Releases for Research Activities

Less than half of the reviewed AoD documents (47%, 23/48) include a reference to teaching release(s) for research activities, ranging from general statements indicating only that releases will be considered for faculty with active research programs to specific allocated teaching releases for faculty holding research chairs. In an alternative approach, some units assign more teaching for faculty with limited research activity (e.g. Geology and Physics, Political Studies, College of A&S). Some units indicate teaching releases for research only when funds for course buy-out are available from research grants (Indigenous Studies and Sociology, College of A&S; Law).

Other Teaching Accommodations

Slightly more than two-fifths of the documents (44%, 21/48) include a reference to other teaching accommodations. Uniquely, SENS states that team teaching of course with high enrolments will be prioritized and TA support will be provided for high enrolment or field-intensive courses. APP, College of Medicine lists class size, use of TA, and lab vs lecture hours are listed as additional factors considered in the assignment of teaching loads. School of Public Health states faculty are permitted to banking classes by taking a heavier load in one year to have a reduction in load the next year.

Reduction of undergraduate teaching is given for curriculum development (SoRC, College of Medicine), for delivery of graduate courses and completed PhD comprehensive examinations and dissertations, and supervision of PDFs (History, College of A&S; APP and SoRC, College of Medicine).

Included in this category are further specifications regarding teaching load equivalencies and other factors considered in the assignment of teaching loads. For instance, graduate and undergraduate teaching are considered equal by Math/Stats, College of A&S. Curriculum development (Political Studies, College of A&S), supervision of 10-15 interns (Ed Curriculum, College of Education), and a combination of practicum courses (Sociology, College of A&S) are itemized as equivalent to one 3-cu course. Other equivalences include shared lectures and field teaching (Geology, College of A&S).

Other Expectations (e.g. Professional Skills)

Two-fifths of the reviewed AoDs (40%, 19/48) itemize expectations of faculty, other than teaching, research, and service. Community outreach activities are stated in (Archeology & Anthropology and Indigenous Studies, College of A&S). To outreach, Archeology & Anthropology add: mentorship of junior faculty, media activities, abd service to funding agencies. Private practice is assumed by College of Dentistry and most departments in College of Medicine. In the former, equivalents are state: 4 days/week to part-time and 5 days/week to full-time and in the latter, a minimum of 2 days / week (0.4 FTE) to academic services, which include teaching outside of patient care setting, research and administrative). Nursing faculty need a minimum number hours of clinical nursing hours to maintain their professional license, but must request approval to conduct their clinical hours. Included in this category is explicit statements regarding graduate supervision (e.g. Sociology, College of A&S states supervision of a minimum of 3 graduate students).

Balance of Duties (e.g. 40/40/20)

Less than one-third of the documents (29%, 14/48) include statements regarding the balance of duties across the 3 pillars of faculty work: research, teaching, and service. Several provide a range of percentages. For instance, 20-60% for teaching and 10-30% for service (Biology, College of A&S) and 10-50% for teaching, 30-90% for RSAW, and 5-30% for service (APP, College of Medicine).

Indigenous Studies, College of A&S deviates from the commonly assumed 40/40/20 split of duties while taking into account the four area of outreach: 35% for teaching, 35% for RSAW, 15% for administrative contributions, and 15% for outreach and engagement activities. In the College of Dentistry, the actual % of each area depends on faculty's past performance and preferences and in

Pediatrics, College of Medicine, the percentage of time dedicated to RASW depends on designation of faculty member.

Since Library faculty do not have teaching responsibilities, the balance of duties for the "baseline assignment" is given as 75% of time on professional practice, 15% on RSAW, and 10% on administration, public service and outreach.

Reference to Standards for Tenure & Promotion

Three-fifths of the reviewed AoDs (60%, 29/48) include reference to the standards for tenure and promotion for the unit's faculty. Some include very general statements with no specifics given (e.g. Education Administration, College of Education); others quote the Collective Agreement (BMI and SoRC, College of Medicine). Several indicate that all duties must be assigned that allow faculty to meet standards for tenure and promotion (e.g. Geology and Sociology, College of A&S) whereas others specify specific duties. For instance Indigenous Studies, College of A&S refers to graduate supervision and Archeology & Anthropology and Physics, College of A&S, refer to administrative service, and Johnson Shoyoma School lists public policy professional activities.

Accommodations for Stage of Career

The most common element of the AoD documents is accommodations made for a faculty's stage of career (83%, 40/48). Most usual accommodation is the reduction in teaching load for the first years of appointment; less commonly stated are service, research, and graduate supervision accommodations. Unique to Archeology & Anthropology and Physics, College of A&S is the specification that peer-teaching evaluations are not required of tenure-track but yet-tenured faculty.

Recommendations:

➢ Develop university-wide procedures as part of the institution's emergency measures planning to make the necessary adjustments and accommodations for the potential increase in faculty workload resulting from public health emergencies.

➢ Increase the faculty complement since the complement within a unit inevitably affects the workload of the unit's faculty. With greater numbers of faculty, administrative duties can be distributed more widely and sabbatical, maternity, medical, and other leaves are more easily covered.

➢ Apply a holistic approach to the management of academic workloads that is sensitized to the complexity of the nature of academic work which makes it difficult to precisely parse into working hours.

➢ Revise Assignment of Duties procedures to more fully account for the work that faculty do and to ensure that the duties fall within what is deemed reasonable. The revisions to the Assignment of Duties procedures should include, but are not limited to:
  a) Align the Assignment of Duties procedures with standards for career progression.
  b) Align the Assignment of Duties procedures with Salary Review procedures.

c) Align the Assignment of Duties procedures with the Collective Agreement, particularly Article 11. Units should not refuse to carry-forward credit for overload teaching during 'lean times'.

d) Account for the different workload (including preparation) associated with diverse types of teaching and course formats (such as student enrolment, number of times a faculty member has taught a specific course, clinical teaching, remote and on-line formats, etc).

e) Account for the unscheduled teaching responsibilities (student counselling and advising, laboratory set-up and management, TA and GTF supervision, etc.)

f) Ensure that graduate student and postdoctoral supervision is included in the Assignment of Duties.

g) Apply consideration of stage of career to all components of faculty work across all ranks.

h) Incorporate a multi-year timeframe in the Assignment of Duties guidelines for evaluation of equitability of workloads. Rolling 3-year or 5-year averages of faculty productivity across all areas of duties are suggested, but individual units should decide on the timeline that best suits the particular rhythms of the unit.

V.   Focus Groups with Faculty Association Representatives and Department Heads

The focus groups with Faculty Association Representatives (FARs) and Department Heads were held in June 2022. The discussions were facilitated by the USFA representatives (Pamela Downe, Dennilyn Parker, and Elizabeth Quinlan). Each discussion lasted approximately one hour and covered a set of open-ended questions that were determined ahead of time. The results were coded thematically (using an adapted version of J. Saldana's[45] versus coding). The questions posed and the results are presented below.

Participants in Focus Group 1: Six Department Heads across three Colleges

Participants in Focus Group 2: Fifteen Faculty Association Representatives across eight Colleges and Schools

1. **From your perspective as FARs/Department Heads, what do you think are some of the faculty members' workload concerns that this Committee should address?**

   Teaching Loads and Graduate Supervision in the Context of Reduced Resources and Faculty Complement

   - There are not enough people doing the work. As faculty complements are reduced while teaching expectations (number of courses as well as class sizes) increase, this loads on individual faculty members become unreasonably heavy.

   - Faculty are burning out and they are leaving. This exacerbates the problem of reduced faculty complement and exacerbates the strain put on current faculty.

   - Reduction in teaching supports (TAs) increases faculty workload. This not only increases the course-related labour, but it requires faculty to rationalize pedagogical strategies that are NOT optimal for students or programs.

   - When faculty complement is decreased, enrolments go down because courses cannot be offered. However, this has such significant budgetary implications that there is often "no

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[45] Saldana, J. (2021). *The Coding Manual for Qualitative Researchers*, 4th edition. Los Angeles: Sage.

choice" for existing faculty except to increase teaching loads and enrolments. This is unsustainable in light of RSAW expectations.

- There is increasing expectations that supervisors fully fund students to cover all living as well as research costs. This means greater expectations of grant success that requires time and work energy that are difficult to find given the work involved in teaching and increasing clerical work taken on by faculty.

Inequity Across Comparable Units
- Units that are within the same division in the same School or College often have inequitable loads. This means that faculty workload is uneven. This leads to resentment and inequitable distribution of salary increments as well as inequitable career progress.

- One FAR reported being in several departments throughout their career. One was very small, one medium sized, and one large. The workload in the small and mid-sized departments was heavier than in the large departments. In small departments, faculty have to do far more administrative and clerical work than they do in larger departments.

Lacking RSAW Support
- Research time is often the 'leftover time' instead of being assigned/allotted. It is what gets done during the summer. There is no support for RSAW activities to sustain the work while other duties are taking all the work time.

- The collapse of research support in the College of Arts and Science meant that faculty who are managing significant amounts of money and hiring HQP are doing so on their own. Cutting the RSAW support has significantly increased faculty RSAW workload.

- Critical RSAW expertise is being lost as faculty complements decrease. This means that existing faculty must develop expertise in new areas as well as maintain their established areas of RSAW activity. This increases workload and is not recognized in any way.

Clerical and Administrative Tasks
- Faculty are required to use many systems to complete their work. These systems are managed independently of each other and therefore, there is duplicate and unnecessary work. There is accounting of the cumulative work time that is devoted to each individual system: "REB, Concur, Connection Point. The people who work within one system/unit do not recognize that we have heavy loads in other sectors. There is no overall coordination."

- Increases in, and redesigning of administrative tasks are undertaken to make work more efficient for administrators. However, these have routinely added more work for faculty, increasing the time it takes to complete one task (such as submitting an expense claim, arranging travel, or responding to 100+ JIRA emails in one day) six-fold. *"It is not that faculty are asked to do too much work. It is that faculty are required to do too much useless and silly work."* This requires that faculty increase workload in order to complete the essential work of teaching, grad supervision, RSAW, clinical practice, and/or public outreach.

- Administrators' claims that new processes will create a more "efficient" flow of work creates enormous inefficiencies for faculty.

- Administrative initiatives (eg. Uniforum) require faculty to devote time to administrative tasks for which the purpose is not clear, nor is the work ever recognized. The Red Tape Commission proposed that every time a new form is created, the creator needed to justify the form and

eliminate another form. This suggestion was not accepted by senior administration and the workload of faculty has continued to increase with each new form and new process.

Unequal Distribution of Recognition/Reward Across Duties

- Much of the work that faculty accomplish (especially in teaching, administration, public outreach, and clinical work) is required but not recognized in systems of merit or career progression. Therefore, workload increases to do all of that work in addition to RSAW (which is generally recognized and rewarded). A more equitable system of recognition could alleviate this issue.

Overall Increase in Expectations/Requirements

- There is an increase in the expectations in terms of teaching, research, and service. This includes increased expectations for grad student supervision without supports for the extra work that this entails. There is increasing expectations regarding peer review of teaching without an indication of how that increased work can be accommodated within faculty workloads.

- There are increased expectations regarding tenure and promotion case files: "*Some faculty spend four months assembling a case file that is in excess of 1000 pages. This is not only enormous work for them but for the committee members who read and assess this file*."

- With increased number of administrators, that in turn increases admin work of faculty as they are asked for more reports etc. to feed back to administrators.

Inadequate Compensation to Departments / Colleges for Admin Secondments

- When faculty accept administrative positions, there is little compensation to the Departments or non-Departmentalized Colleges for the loss in teaching, grad supervision, and governance work. Sessional backfill does little to cover the loss in governance and graduate student supervisory work. This work then must be taken up by existing faculty, increasing their workloads considerably.

2. **We are tasked with identifying the criteria we should be considering when we discuss workload. What needs to be considered when determining if workload is excessive or reasonable?**

Imbalance in Work Assignment

- The 40-40-20 portioning of faculty time is a "*myth*." An imbalanced distribution of the time devoted to teaching, research, and administrative work is a clear indication of workload imbalance. Excess is indicated when the hours devoted to these tasks exceed reasonable number of working hours.

Faculty Stress and Burnout

- The extent to which faculty have taken or have considered taking a leave due to workload stress and burnout is one indicator of excess workload. Similarly, the extent to which faculty have resigned or have considered resigning over workload stress is an indicator of excess workload (and a very extreme indicator).

Hours of Work

- The expectations of increased clerical work and administrative work increase working hours well beyond what is reasonable. There clerical and administrative tasks include those associated with Concur, UnivRS, AES platforms and accommodations, LMS training, budgeting, RSAW-related hiring processes, conflict resolutions (with Concur and Connection Point staff particularly), student initiatives, governance requirements, backfilling for absent and recently retired colleagues, and responding to College-level initiatives. These are undertaken in addition to RSAW

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obligations, teaching loads, clinical work, and larger administrative tasks (such as serving as grad chair). "*We don't stop. We are nickeled and dimed so much that in order to get all our work done, we can't stop.*"

- Work time should not only include teaching time and research time, but preparation time. The differences in time needed to develop and teach a new course versus a familiar course need to be considered. The unstructured work – mentorship, student advising, peer reviews – need to be accounted for in work time calculations.

Frequency of Administrative Obstacles
- How frequently faculty members face administrative obstacles and barriers that impede teaching and RSAW duties. These obstacles and barriers (such as obstructionist approaches to processing expense claims, delays in travel approvals, etc) increase workload for faculty.

Frequency of Difficulties with and Deviations from Assignment of Duties Process
- Conflict with Dean over Assignment of Duties creates obstacles to ensuring equity in workload across faculty and through time.

- The extent to which there are deviations from the approved Assignment of Duties, with faculty taking on work that extends beyond that listed on the Assignment of Duties may be an indicator of excessive workload.

- The lack of clarity in how much work is encompassed in the duties assigned is one indicator that excessive workload could result. A clear articulation of the expectations associated with each assigned duty would help in ensuring that the workload does not increase excessively.

- There is a lack of integration of Assignment of Duties with career progression. There is no coordination between Assignment of Duties and the Standards for Tenure and Promotion.

3. **What are the barriers to addressing workload concerns?**

No Recognition of the Work Involved in the Duties
- Indices of Performance are too reductionist and exclude some types of work altogether. They render some work (such as interdisciplinary work) invisible. This has workload implications in that faculty must increase their workload to fit the indices but continue with the work that is not captured by this tool.

- Calculations of teaching time emphasize contact hours, but there is no room here to accommodate the preparation time for teaching or the grading.

- There is no recognition of the work that teaching a series of new courses every year entails. It is weighted the same in the Assignment of Duties as teaching a familiar course.

Devaluation of Faculty Work
- There is a clearly articulated belief among some administrative leaders that faculty are not working hard: "*Administrators do not believe that our concerns are 'real' and, without knowing how much work we actually do, have decided that we do not do enough.*"

- Department Heads are not trusted and are constantly challenged when it comes to assigning duties. Deans do not listen when concerns for faculty workload are expressed by Department Heads of faculty themselves. The constant demand that faculty teach more, increase RSAW activity, increase grad student supervision, increase clinical engagement, and take on increased clerical work results in a devaluation of the work currently being done.

TABBS / RCM
- Faculty know that if they do not overwork, the budget to their units will be cut and students will suffer. This creates a requirement for workload excess.

- These models render the complexities of faculty work invisible. These reductionist measures do not capture all that faculty accomplish and *"they require faculty (and staff) to do more and more with less and less."*

- Faculty are being assigned more work in order to generate more money for Colleges through RCM models. The consequence is that faculty workload concerns are deprioritized in favour of greater resource allocation. This, in turn, leads to burnout and low retention. This is particularly a concern for Department Heads.

4. **How equitably distributed are workload concerns among the faculty members in your unit?**

   Rank
   - There is largely equitable concerns about workload throughout the ranks but there are intersectional issues that must be addressed. Women are more likely to be more represented among junior ranks.

   EDI Categories
   - There is an often implicit but still very clear expectation that women step up to do more of the administrative and student-related labour. Women often do that and are therefore affected disproportionately by workload concerns.

5. **What are ways in which faculty in your unit effectively manage workload?**

   Set Boundaries
   - Saying no and setting firm boundaries around work.

   Individualize Workload Expectations
   - Some faculty are very effective at saying no to tasks, but this does not lower the collective workload that must be accomplished. "*The faculty who are really good at saying no, are also pretty good at ignoring the fact that when they say 'no' to a task, they are increasing the workload of a colleague. We need structural change, not an individual approach that will continue to add more and more work to fewer and fewer faculty*."

6. **What are some potential solutions to workload concerns?**

   Reduce Unnecessary Work
   - There is too much work that is being downloaded to faculty. CGPS made positive changes to the requirements to the composition of grad student committees that reduced faculty workload without jeopardizing the quality of student experience in most cases. This kind of structural change is needed more broadly in the university, particularly in regards to clerical work/administration.

   Clear Expectations that Focus on Reasonable Workloads
   - A clear and succinct articulation of what constitutes a manageable and reasonable workload needs to be advanced and supported.

   Increase the Visibility and Value of Faculty Work
   - What faculty actually do, and the contributions they make to and beyond their units are often rendered invisible. A strategy to make the work visible and to recognize the work is needed.

- Not only is hiring more faculty critical, but providing adequate supports for faculty should be prioritized over administrative efficiency.

Recommendations

➢ Develop a clear standard for what constitutes a "reasonable" workload in all units.

➢ Develop a procedure to assess workload in comparable units (e.g. "social sciences" or "clinical programs") and mechanisms to establish greater equity across these units. Article 11 stipulates that there must be equity in duties within a unit, but the principle of equity should extend across comparable units.

➢ Develop and implement procedures whereby University administrators at College/School- and University- levels must account for budget decisions in specific regards to faculty workload.

➢ Revise salary review procedures to account more fully for the work that faculty do. Too much of this work is essential but "invisible." and thereby not valued. A re-valuation of this work is needed.

➢ Develop and implement mechanisms to reduce the clerical/administrative tasks required of faculty.

➢ Provide full compensation to untis when faculty move to out-of-scope administrative offices.

➢ Develop and implement mechanisms to support the collegiality of Assignment of Duties processes. These mechanisms should include but are not limited to:

a) Measures for College Deans and School Directors to communicate transparently and respectfully with faculty and unit heads regarding the faculty members' Assignments of Duties.

b) Annual joint sessions held by the USFA and the Vice-Provost Faculty Relations to educate unit heads on Assignment of Duties procedures and best practices.

➢ Revise the budgetary formulae (e.g. RCM, TABBS) to support the work of faculty more consistently and comprehensively.

➢ Provide staff of auxiliary units with education related to faculty workloads and how their interactions with faculty affect those workloads.

VI. FACULTY WORKLOAD SURVEY DATA ANALYSES[1]

Demographics

- The USFA representatives to the Workload Committee invited all 1005 in-scope faculty members as of October 2022 at the University of Saskatchewan to complete the survey. A total of 383 faculty submitted completed surveys. This represents an overall response rate of 38%.

Gender

- There was a relatively even representation of men and women.
- Due to the low number of respondents identifying as non-binary, the analyses involving gender will be restricted to those identifying as men or women.

Gender

2   29

181

171

■ Woman   ■ Man   ■ Non-Binary   ■ No Answer
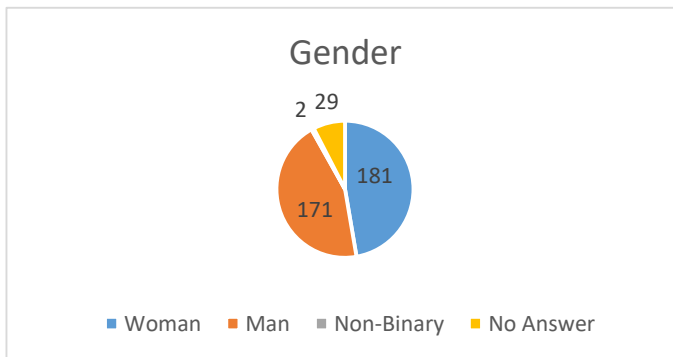
Rank

- The majority of the sample was comprised of Full and Associate ranks. However, there are enough respondents across all ranks to allow for rank-based analyses.
- The response rate among Full Prof/Librarian was 36.4%; for Associate Prof/Librarian – 39.7%; for Assistant Prof/Librarian – 37%; For Lecturer/Instructor 40%

Rank

37

78

156

109

■ Prof/Librarian   ■ Associate Prof/Librarian

■ Assistant Prof/Librarian ■ Lecturer/Instructor

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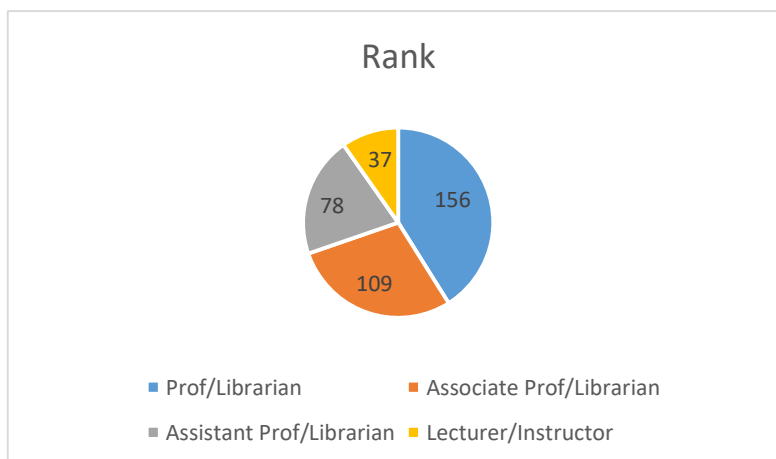
[1] We acknowledge and express our gratitude to Dr. Karen Lawson for her invaluable work on this section of the report.

College/School

- Almost 1/3 of the respondents represented the College of Arts and Science.
- The college-based analyses summarized later are restricted to those with a response rate of more than 20.
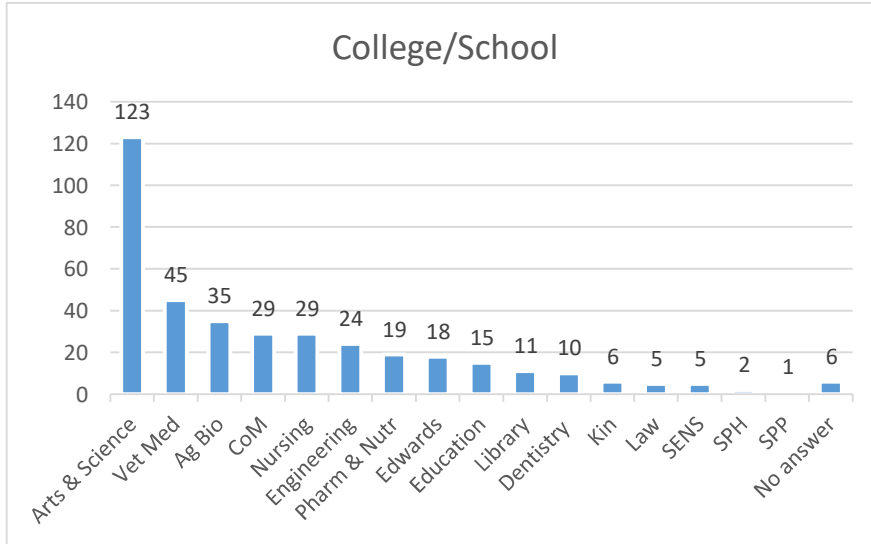
EDI Group Membership

- The following graph shows the distribution of EDI groupings (number of respondents identifying with each category) by rank. Further comparative analyses between and among these groups will not be undertaken because of the small sample size.
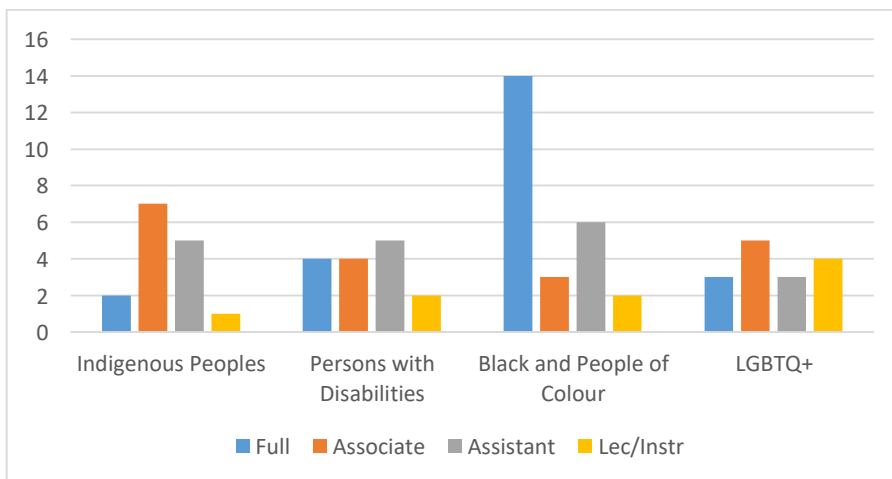
WORKLOAD – HOURS WORKED

21

HOURS WORKED PER WEEK

- 300 Respondents
- The hours of work per week reported ranged from 8 hours to 98 hours with an average of 53.3 (sd 11.6)
    - RANK: Those at the Full, Associate, Assistant and Lecturer/Instructor ranks did not differ in their reported hours/week worked (53.0, 53.2, 53.8, 52.8 respectively) $F(3, 270)=.134$, $p=.94$
- GENDER: Women and men did not differ in their reported hours worked per week $F(1, 270)=0.003$, $p=.96$. Both reported working an average of 53.2 hours per week.

INTERACTION: There was no interaction effect between rank and gender, $F(3, 279) = .32$, $p=.81$

PERCEPTIONS OF REASONABLE WORKLOAD (HOURS PER WEEK)

- 268 respondents
- The average was 42.9 hours/week (sd 6.0,)
- People report working significantly more hours/week (53.3) than they believe is a reasonable number of hours/week for faculty (42.9), $t(264) = 16.7$, $p<.001$

- FULL, ASSOCIATE, AND ASSISTANT RANKS REPORT WORKING ~ 53 HOURS/WEEK

HOURS WORKED AND PERCEPTIONS OF REASONABLE WORKLOAD DIFFERENTIAL

The differential between hours worked per week and perceived reasonable workhours per week for each respondent was calculated. The differential did not differ by rank, but women (11.7) did report a slightly higher discrepancy than men (9.2), $t(263) = 2.1$, $p=.04$.

In addition a higher discrepancy was associated with:

- Lower satisfaction with, and sense of control over, workload
- Working evenings and weekend and a perception of increasing workload over the last 3 years
- Perceived difficulty in balancing work and family
- Feelings of inadequate support from, and being valued by, College/School level leaders
- Perceived inequities in assignments of duties, dissatisfaction with the salary review process, and heightened consideration of leaving the university due to workload issues.

- PERCEIVED REASONABLE WORKLOAD IS LESS AT ~43 HOURS/WEEK

- MEN AND WOMEN DO NOT DIFFER IN THE REPORTED HOURS WORKED/ WEEK

- PERCEPTION THAT ONE IS WORKING MORE HOURS/WEEK THAN REASONABLE IS ASSOCIATED WITH VARIOUS INDICES OF DISSATISFACTION

SECTION I: WORKLOAD ATTITUDINAL ITEMS – ALL COLLEGES COMBINED

- Table 1 summarizes the workload attitudinal item response means by gender and by rank.

- All variables analyzed by 2 (gender, man/woman) X 4 (rank) MANOVA.
    - GENDER: There is a marginal main effect of gender, Pillai's Trace = .192, $F_{(31, 197)}$ = 1.5, p = .049
    - RANK: There is a main effect of rank, Pillai's Trace = .565, $F_{(93, 597)}$ = 1.49, p = .004
    - INTERACTION: There is no interaction of gender and rank, Pillai's Trace = .397, $F_{(93, 597)}$ = .978, p=.542

- Follow-up univariate analyses were conducted to examine the main effect of rank.

- Table 1 summarizes the findings of the follow-up univariate analyses.

    - Gender – Items exhibiting significant gender differences are highlighted in blue.
    - Rank – Items exhibiting significant differences across ranks are highlighted in green. Group means that do not share a super-script significantly differ from one another.

Main Points

Overall responses to most items hovered around the mean indicating a neutral level of agreement.

A **high level of agreement** with need to work evenings and weekends, complement changes negatively impacting workload, a noticeable increase in work related stress, and a perceived pressure to increase workload to maintain a positive experience for students.

The pattern of responses reflected a **dissatisfaction** with Concur and Connection Point and with the time spent on clerical tasks.

Overall, respondents do not perceive that there is a clear process for addressing workplace concerns, or that university level senior administrators are concerned about faculty workload issues.

Gender

Women reported being slightly less satisfied and more stressed than men. Women also reported more concerns with the assignment of duties process, and were more likely to consider leaving due to workload issues.

Ranks

Associate level ranks appear to have more workload issues than the other ranks.

Lecturers and Associate level ranks more likely to consider leaving because of workload issues.
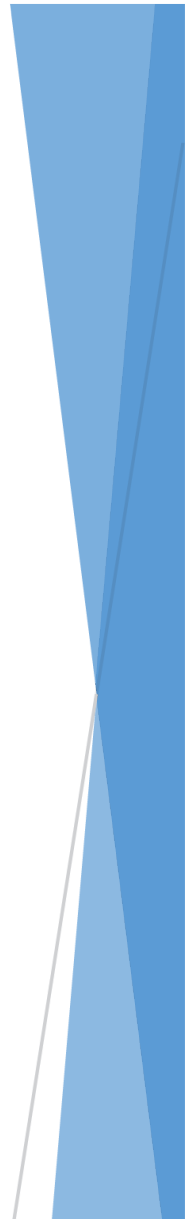
TABLE 1: WORKLOAD ITEMS BY GENDER AND RANK

|	GENDER							
	Women	Men	p	Full	Associate	Assistant	Lect/Instr	p
I am satisfied with my workload	2.3	2.7	.04	2.8[a]	2.2[b]	2.6[a]	1.8[b]	<.001
40-40-20 distribution represents my workload	1.8	2.1	-	2.2[a]	1.9[ac]	1.8[bc]	1.3[bc]	.05
Workload is under my control	2.5	2.9	.02	3.0[a]	2.4[b]	2.7[ab]	2.2[b]	.002
I work evenings/weekends to manage workload	4.3	4.3	-	4.3	4.4	4.4	4.3	-
Easy to balance workload and family	2.1	2.5	-	2.6[a]	2.0[bc]	2.2[bc]	2.5[ac]	.01
Workload increased over last 3 years	3.9	3.8	-	3.9[a]	4.1[a]	3.4[bc]	4.1[ac]	.02
Majority of faculty struggling with workload	3.7	3.2	-	3.3	3.6	3.3	3.5	-
Concur helps to lower my workload	1.8	2.0	-	1.9	1.7	1.9	1.8	-
ConnectionPoint helps to lower my workload	2.0	2.0	-	2.0	1.9	2.1	2.1	-
Auxiliary units coordinated to support faculty workload	2.5	2.4	-	2.3[a]	2.4[a]	2.8[b]	2.7[ab]	.01
Auxiliary unit workload expectations reasonable	2.4	2.3	-	2.2[a]	2.4[a]	2.7[b]	2.2[a]	.02
Senior leaders concerned about faculty workload	2.0	1.9	-	2.0	1.9	2.1	1.5	-
College/School leaders concerned about faculty workload	2.4	2.6	-	2.6	2.4	2.6	2.3	-
College/School leaders provide support for my work	2.4	2.5	-	2.4	2.3	2.8	2.2	-
College/School leaders value full range of my work	2.7	2.9	.05	2.8	2.8	2.7	2.0	-
College/School supports my RSAW	2.8	2.8	-	2.8	2.8	3.0	2.3	-
College/School supports my teaching	2.9	3.2	-	3.2	2.8	3.2	2.6	-
College/School supports my clinical work	Not enough responses to calculate meaningful results							
College/School has clear process for workload concerns	1.9	2.2	-	2.2	2.0	2.0	1.9	-
AoD in my unit is equitable	2.8	3.0	-	3.0	2.8	2.9	2.2	-
Rank/EDI considered in workload in my unit	2.6	3.0	.01	3.1[a]	2.6[b]	2.6[b]	2.5[b]	.04
AoD equitable to similar units	1.9	2.3	-	2.2	2.0	1.9	2.1	-
AoD process transparent in my unit	3.1	3.6	<.001	3.6[a]	3.2[b]	3.2[b]	2.7[b]	.007
AoD unit autonomy without upper-level interference	2.7	2.9	.01	2.7	2.7	3.0	2.8	-
Complement changes negatively impact my workload	4.0	3.8	-	3.8	4.0	3.8	4.3	-
My work related stress has increased	4.0	3.8	.05	3.7	4.1	3.9	4.1	-
Considered leaving due to workload	3.3	2.9	.01	2.8[a]	3.4[bc]	3.0[ac]	4.0[bc]	.007
Dissatisfaction with time spent on clerical tasks	4.1	3.9	-	4.1	4.1	3.7	3.5	-
Workload pressure b/c budget	3.6	3.4	-	3.4	3.5	3.4	4.2	-
Workload pressure b/c students	4.2	4.0	.03	4.0	4.1	4.0	4.4	-
Recognized in salary review process	2.5	2.7	-	2.7	2.5	2.7	1.8	-

Note: all items scores on a 5 pt response scale (1 = strongly disagree to 5 = strongly agree); means sharing a superscript do not differ significantly from each other

INCREASE IN STRESS & CONSIDERATION OF LEAVING

The following is a graph of the responses to the item "There has been a noticeable increase in my work-related stress" (percentage of respondents in each rank). This distribution highlights that the majority of all ranks agree or strongly agree with this statement.
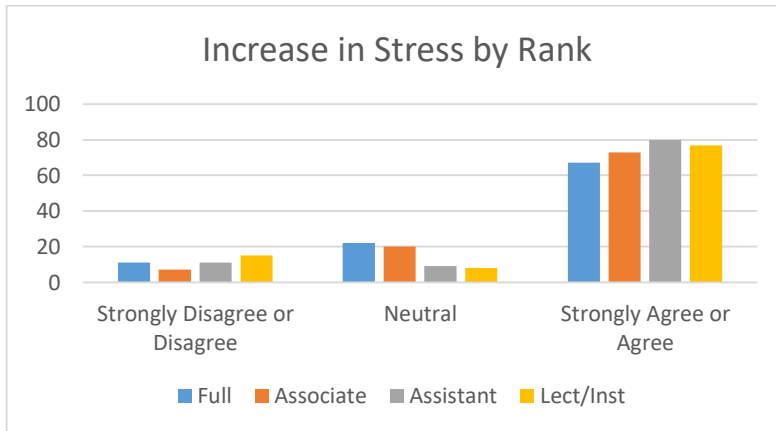
The following is a graph of the responses to the item "I have considered leaving my job because of workload issues" (percentage of respondents in each rank). Just less than half the respondents in the Full, Associate, or Assistant ranks endorsed this item. In contrast, approximately 2/3 of the respondents from the Lecturer/Instructor category indicated agreement with this statement.
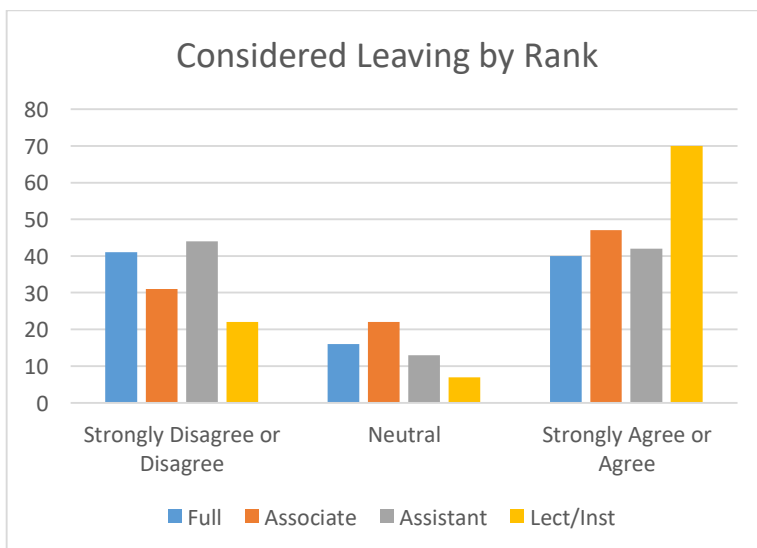
SECTION 2: WORKLOAD ATTITUDINAL ITEMS BY COLLEGE

Table 2 summarizes the workload attitudinal item response means by college (restricted to those colleges with 20 responses or greater).

- All variables analyzed by a one-way MANOVA. The omnibus F value indicated that there was a significant effect of college on the combined variables, Pillai's Trace = 1.85, F = 1.5, p <.001

- Follow-up univariate analyses were conducted to examine the specific college related differences.

- Table 2 summarizes the findings of the follow-up univariate analyses.

    o Items exhibiting significant differences across the colleges are highlighted. For these, group means that do not share a super-script significantly differ from one another.

Main Points and Trends

Across all colleges there was a perception that workload has been increasing along with work-related stress. There is a **high level of agreement** with the need to work evenings and weekends to manage workload. Changes in faculty complement negatively impacting workload, dissatisfaction with time spent on clerical tasks, and feeling a pressure to increase workload to maintain a positive experience for students were highly endorsed items.

There is a noticeable increase in work related stress.

Specific College Trends

The respondents from the **College of Nursing**, compared to the other colleges, relayed a pattern of responses reflecting less workplace satisfaction, less perceived support, higher stress and workload pressures, and more concerns relating to assignment of duty issues. These respondents also reported the highest level of considering leaving due to workload issues.

Those from the **College of Medicine** portrayed a more positive workload experience. These respondents evidenced the most satisfaction with, and control over, workload as well as the least work-related stress and pressure due to budget concerns.

Respondents from **Agriculture and BioResources** reported amongst the highest levels of support for RSAW and teaching from their college leaders.

TABLE 2: WORKLOAD ITEMS BY COLLEGE (n>20)	College						
	Arts & Sci	Ag Bio	Eng	CoM	Nursing	Vet Med	p
Hours worked per week	53.7[a]	55.4[a]	54.9[a]	49.2[ab]	42.3[b]	54.4[a]	.006
I am satisfied with my workload	2.5[a]	2.6[a]	2.4[a]	3.4[b]	1.5[c]	2.7[a]	<.001
40-40-20 distribution represents my workload	2.0	2.5	2.4	2.1	1.9	1.7	-
Workload is under my control	2.7[a]	2.8[a]	2.6[a]	3.4[b]	1.5[c]	2.9[a]	<.001
I work evenings/weekends to manage workload	4.3[a]	4.4[a]	4.2[ab]	3.8[b]	4.7[c]	4.3[a]	.003
Easy to balance workload and family	2.2[a]	2.4[ab]	2.0[ac]	2.9[b]	1.6[c]	2.1[a]	.014
Workload increased over last 3 years	4.0[a]	4.2[ac]	3.4[b]	3.6[ab]	4.7[c]	3.9[a]	<.001
Majority of faculty struggling with workload	3.8	3.6	3.8	3.3	4.1	3.5	-
Concur helps to lower my workload	1.8	1.9	2.1	1.9	1.5	1.8	-
ConnectionPoint helps to lower my workload	2.1	2.1	2.2	2.5	1.7	1.8	-
Auxiliary units coordinated to support faculty workload	2.2[a]	2.4[ab]	2.7[b]	2.6[ab]	2.8[b]	2.6[b]	.004
Auxiliary unit workload expectations reasonable	2.4	2.6	2.7	2.8	2.6	2.7	-
Senior leaders concerned about faculty workload	1.9	2.1	2.1	2.1	1.6	2.3	-
College/School leaders concerned about faculty workload	2.4	2.7	2.4	2.5	2.1	2.7	-
College/School leaders provide support for my work	2.2	2.7	2.1	2.7	1.9	2.4	-
College/School leaders value full range of my work	2.5	2.1	2.6	2.8	2.0	2.9	-
College/School supports my RSAW	2.6[ac]	3.3[b]	2.5[ac]	3.1[ab]	2.2[c]	2.9[ab]	.006
College/School supports my teaching	3.0[a]	3.5[b]	2.9[ab]	3.3[ab]	2.0[c]	3.3[ab]	<.001
College/School supports my clinical work	Not enough data to calculate meaningful results						
College/School has clear process for workload concerns	2.0	2.2	2.1	2.2	1.7	2.0	-
AoD in my unit is equitable	3.1[a]	2.9[a]	2.9[a]	3.2[b]	1.6[c]	2.7[a]	<.001
Rank/EDI considered in workload in my unit	3.2[a]	2.9[a]	2.9[a]	3.0[a]	1.8[b]	2.7[a]	<.001
AoD equitable to similar units	2.7[a]	3.1[b]	2.8[ab]	2.7[a]	1.7[c]	2.5[ab]	<.001
AoD process transparent in my unit	3.6[a]	3.9[a]	3.8[a]	3.6[a]	1.7[b]	3.1[c]	<.001
AoD unit autonomy without upper-level interference	2.4[a]	3.2[b]	3.2[b]	3.9[b]	1.8[c]	3.5[b]	<.001
Complement changes negatively impact my workload	4.0[a]	4.0[a]	3.7[ab]	3.3[b]	4.5[c]	3.9[a]	.01
My work-related stress has increased	4.0[a]	3.8[ab]	4.1[a]	3.3[b]	4.9[c]	3.8[ab]	<.001
Considered leaving due to workload	3.1[a]	3.0[a]	3.5[a]	2.6[a]	4.6[b]	3.3[a]	<.001
Dissatisfaction with time spent on clerical tasks	4.3	4.1	3.9	3.9	4.1	3.9	-
Workload pressure b/c budget	3.7[a]	3.8[a]	3.6[a]	2.7[b]	4.4[c]	3.0[b]	<.001
Workload pressure b/c students	4.1[a]	4.1[a]	4.0[a]	3.7[a]	4.6[b]	3.8[a]	.009
Recognized in salary review process	2.7[a]	2.8[a]	3.1[a]	2.7[a]	1.7[b]	2.6[a]	.005

Note: attitudinal items scores on a 5 pt response scale (1 = strongly disagree to 5 = strongly agree); means sharing a superscript do not differ from each other

SECTION 3: RESPONSES TO OPEN-ENDED QUESTION ABOUT WORKLOAD

The final question in the survey gave respondents the opportunity to share any comments related to faculty workload concerns that they wanted the Joint Workload Committee to know. The question asked: **Are there any specific workload concerns or observations that you would like to share?**

A total of 175 respondents answered this question. Of those, 155 answers were included in three rounds of simultaneous, content coding. Eleven themes emerged from the coding rounds. They are presented below with the number of comments indicated and, where appropriate, with illustrative characteristic comments. (Characteristic comments represent the content and narrative elaboration of the other comments that are included within a thematic category.)

Theme 1: Increase in Administrative Work – Number of Comments: 134

The administrative workload is increasing for faculty. The majority of comments offered by respondents described this dimension of faculty workload. The respondents do not refer to administrative work in terms of collegial service. Rather, the comments focus on managerial tasks.

- "The extreme amount of administrative work that comes with research proposal development, research projects, contract development, research reporting, research fund management, expense claims, personnel management, graduate student processes, research travel arrangements, student processes, all through separate electronic impersonal channels, and with very little situation-informed personal support is a huge drag on faculty time. Centralization of services has been a disaster for the research and teaching focus of the university."

- "Administrative tasks have exploded in the last five years. The college and university have offered only 'thoughts and prayer' to faculty over this issue. Telling us to go for a walk or do yoga is not appreciated. Lower our workload if you don't want us to drown."

Of the 134 comments, 106 comments clustered around 5 sub-themes.

a) Reduction of Staff Support for Faculty – Number of Comments: 27
Respondents note that while the clerical and administrative demands on faculty have increased, there has been a decrease in the staff supports available to faculty. The restriction of services to online assistance is noted as problematic.

- "It would be highly desirable if support staff worked with faculty to deliver teaching and research, which I believe they did much better not too many years ago, instead of making things so labour intensive to do the most simple task. More personnel interaction, instead of exclusively on-line interaction would help."

- "Pooling support staff together in order to reduce the total number of staff results in an increased workload for faculty, despite excellent work done by the staff and their high levels of competence. High turnover and different departmental needs mean staff cannot possibly support departments adequately. Consequently, faculty end up doing a great deal of work that should be done by support staff. The lack of institutional memory/history among support staff means that faculty need to do this clerical work repeatedly or in repetitive ways. The money the College supposedly saves on pooled support staff is lost to wasted faculty time."

b) Concur/Connection Point/ IT – Number of Comments: 26

It is noteworthy that 26 respondents reported that Concur, Connection Point, and IT services add considerable to faculty workloads. While many staff associated with these services are thought to be knowledgeable and hard-working, the comments offered in response to this questionnaire indicate that they often take an antagonistic stand with faculty, questioning the faculty members' integrity.

- "Concur and Connection Point are disasters. I waste weeks of time every time I submit a report. Back and forth communication with staff can last for months. Time and money are wasted. We are not compensated for interest on our credit cards and other expenditures related to endless delays and resubmittals."

- "Connection Point etc. are unmitigated disasters. Implicit questioning of faculty integrity in the ever-increasing level of scrutiny of even small expenditures is plain offensive. If some faculty have been stealing money, there should be some evidence shared with us."

c) Increase in Clerical Work – Number of Comments: 21

These comments focus on the increasing time of basic clerical work and the lack of coordination of auxiliary units that are intended to support the research and teaching missions of the University, but offer little support to the faculty who are fulfilling those missions.

- "The amount of paperwork I am now required to take care of every day has increased exponentially… I was never hired to be a secretary, nor accountant, yet that is what I spend a lot of my time doing."

- "Dealing with the increase in administrative work and dealing with inefficient systems like concur, connection point, and the new 'online only' IT) take up disproportionate amount of my work time at the severe cost of research productivity (which I only have time to do late in the evenings, weekend, and holidays)."

- "Faculty are ping-ponged around from one 'support' unit to the next with no one being able to see the project or issue in its entirety. Faculty have to spend more and more time on clerical work that the fractured nature of services demands of us, without any reduction in the other aspects of our jobs. It is unsustainable."

d) Proliferation of Upper-Level Administrative Positions – Number of Comments: 12

Twelve respondents commented that the increasing numbers of senior administrators has not offset faculty workload. Ten respondents claim that the increase of administrative positions exacerbates faculty workload.

- "It is mind boggling that any institution can so dramatically increase administrative staff and associated costs without decreasing the administrative burden on faculty members who actually execute the research and teaching mission of the university… Increasing administrative bloat is going to have negative and long-lasting impacts on research and teaching, which will ultimately have negative impacts on outputs, outcomes, and the ranking that administrators seem to care so much about."

e) Drive for Administrative Efficiency – Number of Comments: 10

Ten respondents offered comments about the University's drive for efficiency. The term "efficiency" is used here to describe the desire to lessen the work for administrative staff and/or to reduce costs. These efficiencies create more work for faculty.

- "All admin departments appear to enjoy carte blanche in transferring their work and time crunches to faculty members. To have more time to do their own thing, it appears that administrators are free to reduce the time that faculty have to do their job. Everything is justified in terms of efficiency, with no regard for what it means for faculty."

- "The most frustrating workloads for faculty result from the administration's incessant activity to make processes more efficient (and reduce the number of people who used to support them). The constant introduction of new online systems and rules to manage admin processes create many new chores that make our work harder, instead of helping. We are expected to 'learn the ropes' of each newly introduced system when we need it, while there is very little help provided. We are sent to seek help to external web-pages and companies that were procured in the name of efficiency. Yet those external companies know nothing about faculty work."

- "Upper admin seems to be clueless about how their 'cost savings' impact us as faculty."

Theme 2: Morale/Work Environment – Number of Comments: 54

Fifty-four respondents made comments specifically about the level of morale among faculty as well as the work environment in their unit and/or the University. These were the most narratively elaborate comments providing descriptions of exhaustion, overwork, and a lack of acknowledgment/recognition of the work that faculty do.

- "I question why I and my colleagues seem to be overworked, overcommitted, stretched thin, and generally stressed out on a regular basis. I understand that short periods of intense overwork may happen, but this appears to be a norm that we've internalized due to workload creep. Faculty execute the vision and mission of the university and yet it's so very challenging to do this work effectively in a healthy, sustainable way. This isn't OK. I wish for a lot to change for the better for us."

- "Morale is very low. We have higher student numbers and challenging learning needs. We are being asked to teach more and work harder when we are already exhausted and at the breaking point."

Sixteen of the comments focus specifically on a lack of recognition in salary review procedures as well as the devaluation of faculty work by College/School as well as University administrators.

- My and my colleagues' efforts to be heard relative to the negative impacts our punishing workloads are having on faculty have not been successful. The only change has been an increase in workload!"

- "Faculty who are dedicated to their unit and are true team-players are generally underrecognized in terms of reward structures within units and at the university level."

- "At my college, contributions to research and graduate student training are largely dismissed when it comes to resource allocation or strategic planning… I am worried about the devaluation of RSAW work."

Eight of the comments offered made specific mention of burnout.

- "Burned out and ill colleagues fall to the wayside and other faculty must pick up the pieces. Faculty complement dwindles while admin positions proliferate. Not a good look. Demoralizing."

- "As far as I can tell, this university simply does not care about its workers and sees no issue with mass burnout among faculty."

- "The workload has reached a point where I am personally no longer able to carry on! I will have to retire much earlier than I planned."

Theme 3: Increase in Student- and Teaching- Loads – Number of Comments: 29

Twenty-five faculty members made a total of 29 direct comments about the workload-related consequences of an increase in teaching responsibilities, student loads, as well as course coordination.

- "When we did not have the space to accommodate an increase, our teaching workload was increased by 25% with no give in any other area of our work."

- "There are too many students per class. The workload is crushing."

- "Graduate courses are not counted 'in load' and the teaching duties increase every year. There is not time for research."

- "One of the consistent issues that I have is the active minimizing of hours that I spend on course coordination. These hours have risen substantially and are higher than ever as student enrollment numbers and class sections increase due to program restructuring catalyzed and mandated by the Dean's office. The messaging I have received is 'everyone coordinates at least one class, so we don't count those hours'. Obviously, a 24-hour clock still counts those hours."

Theme 4: Assignment of Duties and Inequities in Workload – Number of Comments: 22

Respondents made over 20 comments related to their assignment of duties in comparison to other faculty members within and across units. Eight respondents noted that departmental autonomy is not respected by College administrators while also recognizing that equity across units is necessary.

- "Many large departments have lower teaching loads than my unit, and faculty in those larger departments can avoid all administrative work… Their RSAW activity is seen as more important than others and valued more than others."

- "Faculty in our professional college have a far higher teaching load than other colleges on campus and with our administrative load also increasing there is never enough time to devote to research. This imbalance is frustrating when you see other colleges able to have HALF the teaching load our college is expected to undertake, yet we are still expected to be highly productive in our research endeavours. It is not a realistic expectation."

- "The Dean and College leadership has undermined departmental autonomy and decision making with significant interference with assignment of duties. The growing tendency to

micromanagement on the part of the College not only reduces departmental autonomy but increases workload for many (especially Department Heads) as well as inequities across units."

Theme 5: Clinical Work – Number of Comments: 21

Twenty-one faculty members described the workload concerns specific to clinical work. These comments describe faculty who must add a fourth dimension to the teaching, research, and administration triad of university work. They describe feeling stretched too thin with inadequate recognition of their clinical work.

- "As clinical faculty, we are pulled in too many directions and spread too thin. This leads to a lot of stress-related issues. Our clinical work should be recognized, and we should get monetary rewards. We work as highly trained professionals."

- "Clinical work is about 60% of my workload and is not recognized by the University. Salaries for clinicians need to be adjusted to the current market situation to avoid further loss of faculty members which increase the work of the remaining faculty members."

Theme 6: Declining Faculty Complement – Number of Comments: 19

Respondents noted the decline in the number of full-time faculty in their units increases the work for those who are left. Ten of the 19 comments included a reference to the lack of concern that administrators at the College/School as well as University levels appear to have about this.

- "The number of faculty members in my unit goes down while the work increases. It doubles the already heave workload for the rest of us, but College and University manager just shrug."

- "The University keeps adding new services, apps, and administrators, all of which create work for faculty, which [the administrators] do not recognize because they are living on their own islands. This employer myopia is compounded by the decline in faculty numbers, and hence fewer people to do the work."

- "The Dean's office places the onus on faculty to explain the necessity of replacing a recently retired colleague, who typically leaves behind a large teaching and administrative load that gets folded into the duties of the remaining faculty. To my mind, the Dean's office (and/or greater USask admin) needs to defend a decision NOT to replace a retiring colleague with a tenure-track faculty hire, who still is not able to fill all the duties of the retired colleague because they are early career."

Theme 7: Salary Review Processes – Number of Comments: 8

Eight faculty members made direct reference to salary review procedures in their comments about workload. There are concerns that the allocation of special salary increments do not align with faculty members' assigned duties and workloads.

- "The work that I do is not represented or valued in the salary review process."

- "The salary review process is no longer effective. It is not equitable to compare Research, APA, and Without Term faculty in the same merit pool. Our Assignment of Duties are very different and we should not be compared to everyone in our Department. Instead, we should be

compared to our peers who are in the same position in other departments, and merit should be allocated to each of those groups based on their job title and duties."

Theme 8: Workloads of Department Heads – Number of Comments: 8

Eight respondents commented directly about the workloads associated with the role of Department Head. The online ticketing systems have increased the clerical burden on Department Heads quite significantly.

- "A Head can NEVER take a day off, they are tied to their email day and night, and the auto-generated email from eight different Admin servers needs to be aligned. It is ridiculous."

Theme 9: Rank-Specific Workload Concerns – Number of Comments: 6

Five respondents offered comments about the particular challenges faced by APA and Lecturer faculty. One comment mentioned the extra stress associated with work of tenure-track assistant professors.

- "The lecturer positions are not properly managed at USask. Teaching-focused hires are told their positions will be 'different but equal.' This is simply not true. U of Toronto and many other institutions have clear models on how to make teaching-focused positions equitable, dignified, and sustainable. USask uses these positions in ways that are exploitative and treats lecturers as second-class citizens despite the fact that we are 'faculty members.'"

Theme 10: COVID-19 Pandemic – Number of Comments: 6

Six respondents describe the workload concerns as being directly related to the COVID-19 pandemic and the extra work that remote teaching and student support required.

- "Many of the workload issues derive from pandemic changes, such as remote learning, transitioning courses to CANVAS, then settling into whatever model will be sustained moving forward. Every transition has a HUGE cost in terms of my time. Over the last three years, far more of my time has had to be committed to teaching to help sustain student experience and health and progression, with far less on research (leading to backlogs and stress)."

- "Since the pandemic, my workload has shifted to something closer to 50-20-30 for teaching-research-administration… Trying to give students a satisfactory teaching experience during the pandemic has also dramatically increased time spent in that area. My research has suffered as a result; I simply don't have much time to dedicate to research compared to five years ago."

Theme 11: EDI Issues – Number of Comments: 6

Three of the comments noted that Indigenous and minoritized faculty members carry inequitable workloads because of the administrative and outreach expectations of the University. The other three comments discuss the extra work that is associated with managing the hostility towards faculty in EDI categories and/or seeking the disability-related accommodations that are needed.

- "We have lost two Indigenous scholars this year. This puts more work on the rest of us. This should set alarm bells off, but it won't. It never has."

RECOMMENDATIONS:

➢ Develop a clear standard for what constitutes a "reasonable" workload in all units. This standard should address, but is not limited to:
  a) the appropriate balance among all duties;
  c) the "invisible" work of the units (including faculty mentoring, student advising, conflict resolution, etc.);
  d) Faculty rank.

➢ Provide staff of auxiliary units with education related to faculty workloads and how staff members' interactions with faculty affect those workloads.

➢ Provide direction to staff in CONCUR, Connection Point and IT to facilitate and support, rather than hinder, the work of faculty.

➢ Develop and implement mechanisms to reduce the clerical/administrative tasks required of faculty.

➢ Assess the effectiveness of initiatives (e.g. "Wellness BINGO") designed to prevent and redress faculty burnout.

➢ Develop and implement university-wide policy to limit auto-generated emails to standard working hours (M-F, 8:30a.m.- 5:00p.m.).

➢ Develop procedures for salary review to be calibrated by position type (e.g. Research Chairs, APA, lecturers, instructors) and the different expectations of each position type.

<u>**VII. SUMMARY OF RECOMMENDATIONS FROM THE USFA REPRESENTATIVES REPORT**</u>

The following recommendations are based on the data collected by the USFA representatives to the Joint Workload Committee and presented in the previous sections of our report. They address the major concerns that were repeatedly raised through our work. As per Memorandum of Agreement 9 of the Collective Agreement, we have categorized the recommendations in relation to the Criteria, Procedures, and Mechanisms related to faculty workload.

The one overarching recommendation to establish a standing Joint Workload Oversight Committee is to ensure that workload-related issues can be addressed through an integrated process (rather than through fragmented initiatives and responses) that upholds the standards of collegiality called for by the University of Saskatchewan and the University of Saskatchewan Faculty Association.

1. **Establish a standing Joint Workload Oversight Committee.** This Committee shall:
   a) Oversee the implementation of the recommendations of this report.
   b) Formally adopt the principles for the ongoing assessment and response to faculty workload. These principles shall include but are not limited to those presented in this report.
   c) Collect, generate, and analyze data to track faculty workload trends, including EDI[1] faculty.
   d) Consult with Employer and USFA representatives regarding initiatives that have implications for faculty workload. Monitor and address faculty workloads as a result of these initiatives (see Recommendation B-5).
   e) Present an annual report to the USFA General Meeting.

   Revisions to this mandate and the development of the full terms of reference of the Committee will be undertaken by the Employer and the USFA.

A. Criteria

A-1 Develop a clear standard for what constitutes a "reasonable" workload in all units. This standard should address, but is not limited to:
   a) The appropriate balance among all duties;
   c) The "invisible" work of the units (including faculty mentoring, student advising, conflict resolution, etc.)
   d) Faculty rank.

A-2 Collect and analyze information regarding the extent and impact of faculty burnout. This is an indicator of a sustained excess in faculty workload.

B. Procedures

B-1 Develop and implement procedures for faculty to challenge unreasonable and inequitable Assignments of Duties. These procedures should allow for a timely and informal resolution to conflict related to Assignments of Duties. Until a resolution to the conflict is found, these procedures should, wherever possible, protect the operation of the University, the health and safety of faculty, the interests of student stakeholders. These procedures are intended as a preliminary step before - if necessary – proceeding to rhe grievance procedures of the Collective Agreement, complaint procedures of the University's Discrimination and Harassment Office, provincial Human Rights, and Occupational Health and Safety procedures.

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[1] EDI refers to Equity, Diversity, and Inclusion. EDI faculty are those who are Indigenous, Black, People of Colour, Women, Transgender, Gender Variant, People with Disabilities.

B-2 Develop university-wide procedures as part of the institution's emergency measures planning to make the necessary adjustments and accommodations for the potential increase in faculty workload resulting from public health emergencies.

B-3 Increase the faculty complement. With greater numbers of faculty, administrative duties can be distributed more widely and equitably and sabbatical, maternity, medical, and other leaves are more easily covered.

B-4 Develop a procedure to assess workload in comparable units (e.g. "social sciences" or "clinical programs") and mechanisms to establish greater equity across these units. Article 11.4 stipulates that there must be equity in duties within a unit, but the principle of equity should extend across comparable units.

B-5 Revise Assignment of Duties procedures to more fully account for the work that faculty do and to ensure that the duties fall within what is deemed reasonable (see Recommendation A-1). The revisions to the Assignment of Duties procedures should include, but are not limited to:

a) Align the Assignment of Duties procedures with standards for career progression.
b) Align the Assignment of Duties procedures with Salary Review procedures.
c) Align the Assignment of Duties procedures with the Collective Agreement, particularly Article 11. Units should not refuse to carry-forward credit for overload teaching during 'lean times'.
d) Account for the different workload (including preparation) associated with diverse types of teaching and course formats (such as student enrolment, number of times a faculty member has taught a specific course, clinical teaching, remote and online formats, etc).
e) Account for the unscheduled teaching responsibilities (student counselling and advising, laboratory set-up and management, TA and GTF supervision, etc.)
f) Ensure that graduate student and postdoctoral supervision is included in the Assignment of Duties.
g) Apply considerations of stage of career to all components of faculty work across all ranks.
h) Incorporate a multi-year timeframe in the Assignment of Duties guidelines for evaluation of equitability of workloads. Rolling 3-year or 5-year averages of faculty productivity across all areas of duties are suggested, but individual units should decide on the timeline that best suits the particular rhythms of the unit.

B-6 Revise salary review procedures to account more fully for the work that faculty do. Too much of this work is essential but "invisible" and thereby valued. A re-valuation of this work is needed.

B-7 Develop procedures for salary review to be calibrated by position type (e.g. Research Chairs, APA, lecturers, instructors) and the different expectations associated with each position type.

B-8 Develop and implement procedures whereby University administrators at College/School- and University- levels must account for budget decisions in specific regards to faculty workload. Prior to the implementation of new initiatives that involve faculty, consultation with the Joint Workload Oversight Committee (see Recommendation 1) regarding workload implications and how to mitigate negative workload-effects should be undertaken. Faculty workload considerations and effects of the initiatives should be included in any proposal for approval submitted to a governing body (University Council, University Senate, Board of Governors).

B-9 Develop and implement university-wide policy to limit auto-generated emails to standard working hours (M-F, 8:30am- 5:00pm).

C. Mechanisms

C-1 Develop and implement mechanisms to reduce the clerical/administrative tasks required of faculty. These mechanisms should include, but are not limited to:

a) Measures that reduce the repetition of clerical/administrative work.
b) Measures that will allow for greater coordination among collegial governance procedures (such as Annual Review and Salary Review procedures) that require faculty to spend considerable time preparing materials for these processes.

C-2 Apply a holistic approach to the management of academic workloads that is sensitized to the complexity of the nature of academic work. Faculty work across all assigned duties makes it difficult to pare into precise working hours. A broader set of mechanisms is needed.

C-3 Develop and implement mechanisms to clarify standards for career progression and reduce the expectations for the length of tenure and promotion case files.

C-3 Provide full compensation to units when faculty move to out-of-scope administrative offices.

C-4 Assess the effectiveness of initiatives (e.g. "Wellness BINGO) designed to prevent and redress faculty burnout.

C-5 Provide staff of auxiliary units with education related to faculty workloads and how staff members' interactions with faculty affect those workloads.

C-6 Provide direction to staff in CONCUR, ConnectionPoint, and IT to facilitate and support, rather than hinder, the work of faculty.

C-7 Develop and implement mechanisms to support the collegiality of Assignment of Duties processes. These mechanisms should include but are not limited to:
a) Measures for College Deans and School Directors to communicate transparently and respectfully with faculty and unit heads regarding faculty members' Assignments of Duties.
b) Annual joint sessions held by the USFA and the Vice-Provost Faculty Relations to educate unit heads on Assignment of Duties procedures and best practices.

C-8 Revise budgetary formulae (e.g. RCM, TABBS) to support the work of faculty more consistently and comprehensively.

PART 2

Workload Committee Report – Employer Side
Suzanne Kresta (Dean of Engineering), Jill Blakley (Vice Dean Faculty Relations, Arts and Science), and Solina Richter (Dean of Nursing)

Purpose

To make recommendations about what procedures, criteria and mechanisms could be put in place to address concerns expressed by employers and employees about workload decisions.

Context: Workload at the University of Saskatchewan

At the University of Saskatchewan, teaching, research and service workloads vary among faculty members and units, particularly for those with clinical versus non-clinical appointments and for those with studio, performance-based, applied and experiential components to their research and teaching. Defining workload (the ways/means/processes in which the employer engages in defining workload, the ways in which the faculty member defines their own workload) is not a simple formula, nor should it be. In a post-pandemic environment, in which burnout and risk of attrition is high, addressing workload is a priority for both administrators and faculty.

Every academic institution faces considerable challenges both in managing workloads and achieving 'equitable' workloads. Some of the key issues to be addressed include defining and measuring equity; the differing disciplinary cultures not only across but within some units; embedded collegial processes; and finding appropriate ways to direct and achieve equity goals.

Workload can be divided into two realms within the academy: collective work which must be done, and work we choose to take on as a faculty member. This "passion work" is central to academic freedom, and it allows us to do research—and in some cases teaching—that changes the world and impacts communities. The scope of "passion work" that people take on is an inherent part of academic freedom and is outside what a head or leader should be able to dictate.

While the concept of workload has a tension and is a material reality with many requirements and deadlines, it is also a privilege and a perception. The privilege is the self-directed nature of the work falling under the umbrella of academic freedom and "passion work," and the perception of the weight of work we carry can be impacted by misalignment between expectations and available resources, the drive for excellence tipping into perfectionism, and the emotional loads carried by many of our employees. Our social realities now encompass a broad range of realities outside the workplace, and our workplace has become increasingly complex.

Ultimately, our colleagues fall in a broad spectrum of how much they want to work and how much work they are assigned. We must preserve the freedom to choose how to invest our life energy – while committing to removing unnecessary work from our organization, streamlining

collegial processes and academic governance, and ensuring that workloads which serve these collective commitments remain achievable.

Analysis of Workload Creep and Benchmarking Metrics

The Association requested an analysis of "workload creep." While this is an important question, the complexity of the role of an academic makes any analysis difficult to condense to a manageable data set. Teaching and administration form the core of assignment of duties, and we were able to obtain several useful metrics of teaching activity. Several key points emerge:

1. **Vacation eligibility**: The University of Saskatchewan is the only U15 university in the country which provides 30 days of vacation eligibility to faculty members (Holiday Days.xls). All other U15 schools provide one month (defined as 22-25 working days). We could find only one other institution (TMU) in the country which provides 30 days.
2. **Creep in teaching loads** was found to be insignificant (Course Sections per FTE.xls). This was evaluated based on (# of 3CU equivalent sections taught by USFA members)/(# of FTE equivalent USFA members) over the period from 2017-2021, with the results given below. With a one year drop in FTE faculty in 2021 the campus wide metric has increased from 2.06 (2017-2020) to 2.13.

Year	#3CU equivalent sections	#USFA FTE faculty	Campus wide Sections/Faculty
2017	2087	1000	2.09
2018	2087	1010	2.07
2019	2125	1035	2.05
2020	2065	1002	2.06
2021	2101	988	2.13

3. It is instructive to consider a "minimum reasonable teaching assignment" as a normative metric. For an active researcher in a research-intensive university, a normative teaching assignment of 3-3CU equivalent courses per year, with teaching assigned in 6/7 years (the 7th being a sabbatical leave) gives a threshold of 2.57 - 3 CU equivalent courses per USFA FTE. **The University of Saskatchewan is well below a normative minimum metric of 2.57.**
4. From the perspective of student numbers, a rule of thumb metric for engineering colleges is (23 BSc + 7 GS)/FTE faculty member for a research-intensive school. This rule of thumb balances cost against student experience. For our target student population of 25 000 FTE students, 1000 USFA faculty would give 25 total students/FTE, well below the target range of 30. For the 2022 student population of 26155 (July 18,2022) and the current USFA FTE of 943, the ratio is 27.7 students/USFA FTE. This indicates some movement towards a more sustainable balance. **With a cohort of 1000 academics, a student population of 30 000 FTE's (undergraduate + graduate) should be sustainable.**
5. The employer representatives agree that the university of Saskatchewan is overloaded with committee work and the governance of collegial processes. Employer representatives urged the working group to consider a full examination of places where this workload could be reduced, giving junior faculty more space to develop their research careers, department heads more time for mentoring and leadership, and freeing up deans' time for

advancement activities. There was general agreement at the table that administrative work is not central to the joy we take in this calling – but there was no openness to considering ways this could be reduced within the scope of this working group. **The employer representatives see the work of over-governance as particularly harmful to small departments and non-departmentalized colleges and urge prioritization of this area for savings and reduction in workloads as an outcome of this report.**

Challenges in Workload Assignment

At the request of USFA representatives, the employer representatives have added some clarification on the topic of over-governance and its impact on workloads in this final version of the report.

From an administrative standpoint, 'workload' is a complex combination of rolling, asynchronous decisions reflecting who decides to retire, who receives funding opportunities, including endowed chairs, central reinvestment (or disinvestment) in faculty complements, and faculty decisions about academic programming, research, and administrative work. College administration, for the most part, does not have mechanisms to ensure equitable distribution of workload from year to year, particularly when units have established Assignment of Duties policies. Workload equity cannot be achieved by administration alone; and arguably is heavily influenced by faculty decision-making.

Issues of workload inequity both within and across units are some of the most difficult issues for administration to address, often meeting with hostility and a resistance to change. Workload shift requires a willingness from faculty to shift academic programming, culture, and decision-making processes.

Some units are delivering far more programming that can sustainably be delivered by their faculty members, leading to a dependence on sessional instructors and in extreme cases, difficulty in covering core programming when faculty take leave. Faculty seem very reluctant to let go of established programming streams or even adapt them to reflect reduced complements, the reduced fiscal capacity of the university, or in a few cases, reduced demand for programming, even though such programmatic streamlining could greatly ease heavy workloads. Faculty members need to be willing to make hard choices about program delivery as this falls squarely at the intersection of collegial governance and scholarship.

Small units are often resistant to amalgamation, despite the many streamlining opportunities that arise and the knock-on effects to reduced workload. Small units, by definition, engender a higher administrative workload for all, *including cognate units who must assist in collegial processes*, and including tenure-track junior faculty who should not be subjected to a heavy administrative burden in the early and even mid-portion of their careers. Many collegial administrative processes lead to higher workloads than necessary with many small units and require the willing engagement of faculty and USFA for reform. To take just one example, the merit process currently involves three levels of committees to make awards, needlessly (and

electively) adding hundreds and hundreds of hours to both faculty and administrators' workloads annually. This process can and should be streamlined.

Taking a Principled Approach to Equitable Workloads

There was agreement between both the employer side and the USFA members at the table that the role of an academic should not involve counting "hours" as a definition of workload, and that shared principles can and should be identified. While some Depts have come up with formulas for equitable assignment of workload, principles identify shared values while leaving space for diversity to flourish and local cultures of scholarship to be meaningfully expressed. Principles and guidelines for the Assignment of Duties can help provide some consistency across campus.

In the fall of 2022, the Vice-Provost Faculty Relations (VPFR), following the mandate of the Workload Committee to gather information from the Employer, requested 69 USask academic units to provide a copy of their guidelines for assignment of duties. A preliminary review of the guidelines received was conducted to determine if the guidelines included key elements grouped around faculty status and program/teaching factors.

We received responses from 71% of the 69 units contacted, which included responses from every one of the 16 colleges, schools and the University Library. In these guidelines 50% had principles, 25-77% consider faculty status factors, and 23-73% considered program/teaching factors. No in-depth analyses or definitive conclusions can or should be drawn from this descriptive endeavour designed to generate areas for follow-up and further exploration. Several units indicated that they took more factors into consideration when assigning duties than were listed in their guidelines. For some academic units, assignment of duties guidelines need review.

Since September 2022, Deans Council has held two discussions on important principles and practices in the assignment of duties. Executive Directors and Deans expressed considerable interest in receiving a summary of the information gathered by the VPFR. Honouring the mandate of the Workload Committee: that knowledge gained during the working of the Committee should be used to recommend procedures, criteria and mechanisms; the provost's office is sharing these findings with each Dean/Executive Director.

Under current governance standards, Depts and units have a degree of autonomy in developing their own standards. The Assignment of Duties document for each unit should clearly define the scope of 'academic duties' and include guidelines on teaching loads, recommendations on teaching assignments and implementation, and teaching buyout. Principles to be considered include, but are not limited to:

- Implement and promote best practices to build a supportive campus community. Continue to encourage sustainable lifestyles and personal wellness through campus activities and benefits packages.

- Ensure new tenure-track faculty members are assigned a reduced teaching load in their first two or three years. This includes provision of a 'ramp up' period to reach to full teaching load and provides time for new faculty to establish an active research program.

- Place limits on maximum amount of teaching in a semester and an academic year.

- In units with graduate programs, providing teaching credit to faculty teaching graduate courses.

- Differentiation of teaching loads with course reduction for faculty who are 'research active' (i.e., currently hold tri-council grant, involved in current primary supervision and financial support of thesis-based graduate students, especially PhD students).

- Courses should be assigned in priority to full-time faculty members. The assignment of courses to adjunct and sessional instructors may be done after all faculty members are assigned their normal teaching load. The use of adjunct and sessional instructors for teaching courses should be minimized.

- Ensure a balance of administrative duties across all academic staff. When administrative duties begin to dominate assignment of duties conversations, this should trigger a governance review which considers the value of distributed governance structures vs. the opportunity cost of excessive committee work for all members of the campus community – staff, faculty, unit leaders, and senior administrators.

- Recalling the combination of collective work which must be delivered (collegial governance and teaching) with the accountability for delivering outcomes on our research mission, increased teaching can and should be assigned to those who are no longer actively delivering research outcomes. This accountability on delivering the full scope of assignment of duties is separate from the need for academic freedom, which considers the academic direction and content of the research being conducted.

Key Messages from Assignment of Duties Documents

Establishment of assignment of duties falls outside the purview of USFA, approved by the Colleges. After the survey of assignment of duties processes across campus, it became clear that the assignment of duties principles and processes may be an area requiring review. The college of nursing has just completed this process, and several lessons emerged from this conversation. Key things to remember are the need for transparency, communication, and extensive consultation.

Principles: All tenure track (TT) appointments within the units are expected to contribute to the teaching, research/scholarship, and leadership/administration activities of the colleges. Lecturer/instructor appointments are expected to contribute to the teaching and leadership/administration activities of the college.

Expectations differ depending upon the type of appointment the individual faculty member holds; what stage of career they are in; and whether the faculty also holds a secondment or other unique commitment such as administrative responsibility, inside or outside the colleges. The goals of the guidelines are to outline a rational for the assignment of duties that reflects the following guiding principles:

- Equity
- Openness and transparency
- Empirically based (I.e., measurable)
- Flexible
- Affordable
- Support individual progression through the ranks
- Balances the needs of the colleges (fulfilment of vision and mission) with the unique career goals and contributions of individual faculty members.

At the college/school level, administrators explored whether existing guidelines for assignment of duties include considerations for relative loading of courses, for example:

- Number of contact hours
- Number of students in the section taught
- Graduate student teaching
- Number of graduate students trained per faculty
- Support (such as TAs, markers, etc.)
- Labs (Instructor led or TA led?)
- Number of sections/coordinators
- New course
- Program approval, new curriculum and/or course development
- Early career release to allow for preparation of grants
- Family responsibilities/leaves/accommodations
- Regulatory guidelines related to supervisor to student ratio during clinical supervision
- Release for administrative duties
- Special considerations for scholarly and research activities which are either exceptionally demanding or temporarily inactive

This set of considerations was collected from across the AoD documents submitted from administrative units across campus, and it is important to note that each unit will have some combination of these more typical considerations and their own unique culture and needs.

Deans' Perspectives

Administrators' perspectives on workload, including but not limited to Assignment of Duties processes, were gathered by the VPFR via email survey. Three themes were explored: challenges in achieving workload equity for faculty, 'pain points' for Deans in managing

workload and suggestions for universal principles to guide workload decisions. Common messages and salient points are paraphrased below.

Key Challenges to Achieving Workload Equity for Faculty

- Creating space for gifted researchers to have enough time for their research without making teaching seem like a punishment.
- Trying to achieve something that tries to look equitable across our large diverse college requires taking into account all aspects of teaching, research and administrative loads. Trying to equate the time effort required by someone spending 4-6 years writing a monologue and 'hopefully' supervising graduate students with whom they do not publish(!), with someone spending every day in the lab, daily supervising and mentoring graduate students and PDFs with whom they do publish, is difficult to do.
- Figuring out how to engage faculty in required and necessary administrative work so that the same public-spirited people aren't doing it all.
- Recognizing different kinds of contributions without stigmatizing some faculty members as lazy or uncommitted because they do different kinds of things.
- Some faculty members are rather eager to take on supervisory responsibilities (Undergraduate honours students, thesis-based graduate students). However, these responsibilities are not captured in our college's assignment of duties, thereby requiring that these faculty members do this work "off the side of their desk". This creates inequity between this faculty group versus those who refuse to participate in supervisory duties.
- Deciding how to balance graduate and undergraduate teaching and supervision.
- Assessing the "degree of difficulty" of a course. If Professor X teaches a core, 1st year UG class with 150 students, how does this compare to Professor Y teaching 30 students in a 4th year class?
- Relating a faculty member's degree of research engagement to one's teaching workload. Should disengaged researchers be given more teaching assignments (since presumably, they aren't working as hard as their research active colleagues)?
- Finding equivalency amongst courses that have lecturer, lab and clinical courses (CU calculation)
- Ensuring equitable workload with respect to rank: junior faculty are often tapped by the University and faculty colleagues for additional, informal roles. Faculty who are Indigenous and/or female, or who come from other under-represented groups, are particularly affected by this.
- The diversity of USFA positions with different responsibilities (eg. tenure track, academic programming, lecturer, clinical instructor) that variably include or not include an expectation of teaching, administration, and research/professional practice/scholarly output makes things very challenging. Just considering teaching assignment of duties, the diversity of course types (largely didactic, practice of skills, etc.), the diversity of class sizes, and the diversity of pedagogical approaches to teaching and assessment make achieving workload equity almost impossible (teaching pedagogy and nature of

assessment can make an individual's workload very heavy relative to another individual who simply uses the didactic lecture and midterm/final assessments largely composed of multiple choice questions).

- On the whole, the 'assigned' duties are probably not the major driver of workload inequity. Major workload differences emerge from different levels of research activity, student supervision, student committee involvement, and administrative contributions, some of which are faculty-driven based on individual preferences for research intensity.

'Pain Points' for Deans in Managing Faculty Workload, Including Assignment of Duties

- Reviewing ~300 individual AoDs alongside the individual departmental budget requests – this is required to review teaching loads alongside sessional instructor requests by the department – usually a three-day process!
- Requests for teaching relief because of big grant, sitting on/chairing Tri-agency panels, organising a conference, etc. Teaching assignments are also discounted because of service, such as serving as graduate chair or program lead. These service roles are assigned to senior faculty, of which there are fewer and fewer (due to recent retirement incentives).
- Addressing the backlog of sabbaticals – a throwback to covid – that can sometimes emerge within the system.
- The answer of "more sessional lecturers" is a financial strain and also has a destabilizing effect.
- Ensuring that the college is onside with accreditation standards (e.g., ensuring that a certain proportion of duly qualified faculty members are teaching courses in the college).
- Despite all of our collective effort and a host of algorithms, no Dean has yet to discover the secret workload formula whereby each faculty member teaches courses between 10:00 AM – 2:30 PM on Tuesdays and Thursdays.
- Some faculty may want to 'stack' their teaching in one term (thus providing them with two 'teaching free' terms in the regular academic year) – but this could create a bottleneck for student progression through the degree program.
- Getting faculty to understand that assigning a faculty members workload is like a moving target and while we endeavor to employ a system that is seen to be fair and equitable inevitably assigned duties such as teaching may shift throughout the year based on external factors that deans have little or no control over (ie. leaves, resignations, retirements)
- Senior faculty who are focused heavily on research do not want to take on service assignments.
- Faculty expectations based on historical assignments such that for some faculty they will never accept an increase in assigned duties despite a need to do so.

- Tenured faculty who settle in to a comfortable 'workload' and limited ability of a dean to motivate such individuals to do more in all aspects of their responsibilities (research, teaching, administration).
- Incompetent faculty and a general reluctance to assign such faculty duties as it will disadvantage students and/or the functioning of college committees, etc.
- In the area of teaching, we are understaffed in several key areas. That creates challenges for continuity and trying to keep individual course assignments 'stable' for faculty.
- The financial need for creating non-thesis masters programs (which are teaching intensive) has resulted in the inability to deliver specialized PhD-level courses to thesis-based graduate students.
- The online transition resulting from COVID, and substantive ongoing changes to our programs to meet learner needs, has also influenced workload. Added pressures on faculty resulting from COVID include graduating impacted students, financial management of impacted students and projects, revising and re-revising courses for changing modalities, etc.
- Faculty workload, burnout, and illnesses are also major factors affecting faculty performance and their ability to perform assigned duties.
- USask's bureaucratic administrative processes have also created frustrations and unnecessary challenges.

Potential 'Universal Principles' to Assist Workload Decisions

- When reviewing the whole AoD – teaching, research and admin for each faculty member – consider weighting certain activities more heavily, e.g. Chairing departmental/college level committees
- Ensure communication and transmittal of information from the Dean to the Department Heads, communication from the Department Heads to faculty, and a mechanism for communications to flow upstream from individual faculty to college administrators.
- Transparency and consistency. No side deals.
- Workload assignments should consider the type/nature of appointment (ie. Tenured/Tenure Track VS WOT – Instructor); the teaching/research mandate/needs of the college/unit; and the college/unit's financial state/viability/goals.
- Workload assignments should differentially support the research progress of junior faculty
- Faculty from designated groups are often tasked with greater administrative service to ensure representation. There's no quick and easy way around that, These and other 'voluntary' contributions could be recognized in some way.
- Standardization of a minimum teaching load across the institution.
- Clear definitions withing standards of expectations regarding research and scholarly outputs or practice of professional skills, expectations for graduate student training,

expectations for contributions to administrative work and how the university values different administrative contributions.

Ensuring Academic Freedom is Upheld: Recommendations

For the majority of academics, the freedom to define a significant portion of their working hours, their strategic focus, and their prioritization of activities is a central part of the value we can offer as an employer. This freedom to set a vision and prioritize different parts of the role is something we want to protect.

At the same time, there is a requirement for accountability in all aspects of our role:

- Our teaching and learning charter lays out a shared commitment to excellence in teaching and learning and recognizes the impact of the student experience. It is well established that both excellent learning experiences and outstanding learning environments follow an excellent environment for the instructor, and a high level of commitment to instruction. Delivering on these values is central to our mission as a U15 university.
- Our research strategic plan and aspirations to increase our standing on the global stage require that all academics have active delivery on their research mission. Delivery of research related output, including students graduated, grants received, and the rich variety of peer reviewed RSAW contributions are part of the workload for all academics with a scholarly mandate.
- Our indigenous strategic plan and our EDI strategy require the commitment of our full campus community.
- Our collective commitment to collegial governance requires that all members of our community participate in shared governance and administration. Without this part of our workload, we cannot sustain academic freedom and accountability for peer review in any meaningful way.
- Hourly accounting of workload runs counter to our core values of building opportunity for young people, creating new knowledge, and sustaining each other in a community of scholars.
- Equitable workloads ensure that all members of our community have a fair chance to thrive and excel in their work.