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ARTICLE 17. ASSIGNMENT OF PROFESSIONAL RESPONSIBILITIES

Preamble. The University and the Union recognize that, given the diverse nature of the work performed by bargaining unit faculty members, the varying types of appointments, and the needs of the university, the weighting of assignments and the particulars of individual assignments will vary both between and within units. The University and the Union also recognize that each bargaining unit faculty member has the obligation to devote his or her best efforts to the university, and particularly to students; to perform all duties with professionalism and diligence and in accordance with the standards appropriate in AAU institutions; to act ethically and in compliance with the accepted professional standards; to account for all money or property received; to use money and property only for lawful purposes and in accordance with policy; to treat confidential information as confidential; to cooperate with the university with regard to investigations, audits, and legal proceedings; and to represent the university with professionalism.

Section 1. Assignment of professional responsibilities may consist of some combination of instructional activities (including class preparation, classroom teaching, evaluation of student work, advising and mentoring, and various forms of communication with students); research, scholarship, and creative activity; and service within the department, school, college or institute, and the university, and to external organizations, and communities.

Section 2. The faculty in each department or unit will begin the process of developing a written policy for the assignment of professional responsibilities and stipends or academic support resources, by first considering any input provided by the department or unit head, dean, vice president, Provost, or designee. The faculty will submit their recommended policy to the appropriate dean, vice president, or designee for review. The dean, vice president, or designee will document and discuss any revisions he or she makes to the policy with the faculty before submitting his or her recommended policy to the Provost or designee. The Provost or designee will have final authority to establish the policy for each department or unit. If the Provost or designee materially alters the faculty-recommended policy, he or she will provide a written explanation for the change(s) to the faculty in the department or unit. The department or unit head, dean, vice president, Provost, or designee may initiate changes to established policies by informing the appropriate faculty of the change being considered, thereby initiating the process described in this Section.

Section 3. The workload policy shall define a 1.0 FTE workload for all academic instructional classifications and ranks employed by the department or program, and shall address how each of the following items contribute to the overall FTE. For non-instructional classifications or where tenure-related or non-tenure track faculty are not primarily instructional, specific job descriptions should be developed to address the particular workload of the bargaining unit faculty member. Instructional faculty workloads will, in general, address the following:

- 1 (a) Course load
- 2
- 3 (b) Service expectations
- 4
- 5 (c) Research, scholarship and creative activity
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- 7 (d) Professional development related to teaching, research and service
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- 9 (e) Undergraduate and graduate advising
- 10
- 11 (f) Student contact and communication
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13 **Section 4.** Workload policies should also describe a process for accounting for
14 individual faculty needs when assigning workload. Factors to consider include, but are
15 not limited to:

- 16
- 17 (a) New course preparations
- 18
- 19 (b) Balance of workload components based on faculty review, promotion and
20 tenure, professional development expectations and agenda for research,
21 scholarship and creative activity
- 22
- 23 (c) Administrative duties
- 24
- 25 (d) Timing of activities (e.g., publication and grant deadlines, course load in
26 given terms, and promotion review dates)
- 27
- 28 (e) Job description
- 29

30 **Section 5.** An individual's particular professional responsibilities shall be assigned
31 in accordance with the departmental or unit policy. Assignments shall reflect:

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- 33 a) The instruction, research, and service needs of the university and its
34 departments, institutes, centers and other academic units;
- 35
- 36 b) The bargaining unit member's qualifications and expertise and potential
37 to acquire the appropriate expertise;
- 38
- 39 c) The bargaining unit member's evolving professional
40 interests;
- 41
- 42 d) Generally accepted practices in the field; and
- 43
- 44 e) A realistic balance of duties consistent with the criteria for review.

44 **Section 6.** The Provost or designee shall be responsible for the scheduling and
45 assignment of all bargaining unit faculty members' professional responsibilities. A

1 bargaining unit faculty member shall be afforded the opportunity to meet with his or
2 her dean, director or designee at least annually, before responsibilities are assigned, to
3 discuss the bargaining unit faculty member's preferences regarding assignments for
4 teaching, research, service and other professional responsibilities as set forth in this
5 Article, and the member's anticipated resource needs.
6

7 The Provost or designee may modify scheduled assignments, provided that the
8 department or unit head discusses changes with the faculty member before they are
9 made and that changes are not made for arbitrary or capricious reasons.
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11 Faculty members may request to adjust schedules or assignments.
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13 **Section 7.** Each bargaining unit faculty member must be fully engaged in teaching,
14 research, and service work for the university to the extent of his or her appointment,
15 and must be engaged in work or reasonably available for work for the entirety of the
16 term for which the bargaining unit member is employed unless on approved leave.
17

18 **Section 8.** An overload assignment is (1) an assignment that is in addition to the
19 bargaining unit faculty member's regular assignment and FTE status; (2) a one time or
20 limited assignment, made or approved by the Provost or designee, that is in addition to
21 or different from regular or usual assignments for the member's classification and rank;
22 or (3) assignments unrelated to the bargaining unit member's primary job
23 responsibilities.
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25 **Section 9.** Overload appointments, **except those listed in Section 10**, will be assigned an
26 FTE percentage commensurate with normal workload duties and compensated
27 accordingly. Faculty may request that overload compensation take the form of class
28 release. No bargaining unit faculty member may be disciplined or terminated for
29 refusing an overload assignment.
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31 **Section 10.** ~~Notwithstanding Section 9,~~ The following programs rely on alternative
32 compensation models in order to be financially viable and, therefore, any overload
33 assignments in these programs may be compensated through a lump sum in an amount
34 to be agreed upon by the University and the bargaining unit member:
35

- 36 (a) IntroDuction
- 37 (b) Freshmean Seminar
- 38 (c) College Scholars
- 39 (d) College Advising
- 40 (e) ~~Freshman~~ **First-year** Interest Groups (FIGs)
- 41 (f) General Education Renaissance
- 42 (g) Rutherford Initiative
- 43 (h) Oregon Executive MBA Program (OEMBA)
- 44 (i) Humanities Program
- 45 (j) Academic Extension
- 46 (k) International Student Orientation

- 1 (l) Sports Product Management Program (under review)
- 2 (m) Study Abroad
- 3 (n) Honors College Seminars
- 4 (o) Insight Seminars
- 5 (p) Short Executive Seminars
- 6 (q) Any one-day seminars, workshops, or similar **one-day programs**

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8 Other programs or activities may be compensated with a lump sum upon mutual
9 agreement between the University and the Union.

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11 **Section 10, 11.** Appointments for which compensation is paid, in whole or in part,
12 with federal funds may be ineligible for overload **appointment or** compensation.