



Interoffice Communication

Date: May 22, 2025

To: The President and Board of Trustees

From: Donald Leo, Executive Vice President and Provost

Re: **Advance Ohio Higher Education Act Required Policies**

The 136th Ohio General Assembly enacted the Advance Ohio Higher Education Act (“the Act”), which was signed into law by Governor Mike DeWine on March 28, 2025, and becomes effective on June 27, 2025. The Act requires certain actions of the Board to ensure Ohio University’s compliance with the law, including approval of a policy to prohibit and affirm specific activities to ensure intellectual diversity and nondiscrimination (ORC 3345.0217) and a prompt, fair, and impartial process to address alleged violations (ORC 33.0215). The Act also requires policies for faculty workload (ORC 3345.45), annual evaluation of faculty (ORC 3345.452), post-tenure review (ORC 3345.453), tenure (ORC 3345.454), and retrenchment (ORC 3345.454).

The consent resolution requests Board approval of five interim policies and an interim revision of Ohio University Policy 18.009, titled Faculty Workload. The interim policies draw heavily from the language in the ORC sections listed above. The revised interim Faculty Workload policy responds to the Act’s requirement to equate faculty members’ teaching, research, and service loads to credit hours.

POLICIES REQUIRED BY THE ADVANCE OHIO HIGHER EDUCATION ACT

RESOLUTION 2025 –

WHEREAS, the 136th Ohio General Assembly enacted the Advance Ohio Higher Education Act (“the Act”), which was signed into law by Governor Mike DeWine on March 28, 2025; and

WHEREAS, the Act becomes effective on June 27, 2025, and requires certain actions of the Board to ensure Ohio University’s compliance with the law; and

WHEREAS, pursuant to the Act, Ohio Revised Code Section 3345.0217 now requires a policy that prohibits and affirms specific activities to ensure intellectual diversity and nondiscrimination, and Ohio Revised Code Section 3345.0215 requires a prompt, fair, and impartial process to address alleged violations; and

WHEREAS, pursuant to the Act, Ohio Revised Code Section 3345.45 now requires a policy for faculty workload; and

WHEREAS, pursuant to the Act, Ohio Revised Code Section 3345.452 now requires a policy for annual evaluation of faculty; and

WHEREAS, pursuant to the Act, Ohio Revised Code Section 3345.453 now requires a policy for post-tenure review; and

WHEREAS, pursuant to the Act, Ohio Revised Code Section 3345.454 now requires a policy for tenure and a policy for retrenchment.

NOW THEREFORE, BE IT RESOLVED that the Board of Trustees hereby approves five interim policies attached hereto titled: (1) Advance Ohio Higher Education Act Compliance, (2) Annual Evaluation of Faculty, (3) Post-Tenure Review, (4) Tenure, and (5) Retrenchment.

BE IT FURTHER RESOLVED, that the Board of Trustees hereby approves one revised interim policy attached hereto numbered 18.009, and titled Faculty Workload.

18.010: Advance Ohio Higher Education Act Compliance

Status:

Effective:

Approved by:

Signatures and dates on archival copy

A. Purpose

The purpose of this policy is to ensure Ohio university's compliance with certain provisions of the Advance Ohio Higher Education Act (the "AOHEA", also known as Senate Bill 1 of the 136th General Assembly). This policy informs the campus community about prohibitions and requirements of the AOHEA and provides for a prompt, fair, and impartial process to address alleged violations of this policy.

B. Scope

This policy applies to all Ohio university students, student groups, faculty, and staff on all campuses, including the main campus, regional campuses, and extension campuses, as well as study away programs provided by Ohio university.

C. Definitions

1. "Controversial belief or policy" means any belief or policy that is the subject of political controversy, including issues such as climate policies, electoral politics, foreign policy, diversity, equity, and inclusion programs, immigration policy, marriage, or abortion.
2. "Intellectual diversity" means multiple, divergent, and varied perspectives on an extensive range of public policy issues.
3. "Position, policy, program, and activity" include all of the following:
 - a. All forms of employment, including staff positions, internships, and work studies;
 - b. All policies, including mission statements, hiring policies, promotion policies, and tenure policies;
 - c. All programs and positions, including deanships, provostships, offices, programs, programs presented by residence halls, and committees;
 - d. All activities, including those conducted by the administrative units of orientation, first-year experience, student life, and residential life.

4. Prohibitions, affirmations, and requirements

As required by section 3345.0217 of the Revised Code, Ohio university shall do all of the following:

1. Prohibit all of the following:
 - a. Any orientation or training course regarding diversity, equity, and inclusion, unless Ohio university submits a written request for an exception to the chancellor of higher education because the university determines the orientation or training course is exempt from this prohibition because all aspects of the orientation or course are required to do any of the following:
 - i. Comply with state and federal laws or regulations;
 - ii. Comply with state or federal professional licensure requirements;
 - iii. Obtain or retain accreditation.

The exception request shall include an explanation of the circumstances, and the effort made by Ohio university to comply with section D(1)(a) of this policy.

- b. The continuation of existing diversity, equity, and inclusion offices or departments;
 - c. Establishing new diversity, equity, and inclusion offices or departments;
 - d. Using diversity, equity, and inclusion in job descriptions;
 - e. Contracting with consultants or third parties whose role is or would be to promote admissions, hiring, or promotion on the basis of race, ethnicity, religion, sex, sexual orientation, gender identity, or gender expression;
 - f. The establishment of any new institutional scholarships that use diversity, equity, and inclusion in any manner. For any institutional scholarships existing on the effective date of this policy, Ohio university shall, to the extent possible, eliminate diversity, equity, and inclusion requirements. If Ohio university is unable to do so because of donor requirements, OHIO may continue to offer those institutional scholarships so long as doing so does not violate any applicable law or policy. Further, Ohio university shall not accept any additional funds for the operation of institutional scholarships that have diversity, equity, and inclusion requirements.
2. Ohio university shall not replace any orientation, training, office, or position designated for the purpose of diversity, equity, and inclusion that is prohibited under this policy with an orientation, training, office, or position under a different designation that serves the same or similar purposes, or that uses the same or similar means.
3. In the event that the requirements to obtain a research grant conflict with the prohibitions listed under section D(1) of this policy, Ohio university shall endeavor, to

the extent possible, to comply with section D(1) while retaining eligibility for the research grant, including by consulting with legal counsel. If Ohio university is unable to comply with section D(1) with respect to a research grant, the university shall submit a written request for an exception to the chancellor. The exception request shall include an explanation of the circumstances and the effort the university made to comply with section D(1) while retaining eligibility for the research grant.

4. Sections D(1)(a) and D(1)(c) of this policy do not apply to agreements or contracts regarding any research grants entered into prior to the effective date of this policy. Sections D(1) and D(1)(c) apply to any renewal of such agreements or contracts occurring on or after the effective date of this policy.
5. Ohio university affirms and declares that its primary function is to practice, or support the practice, discovery, improvement, transmission, and dissemination of knowledge and citizenship education by means of research, teaching, discussions, and debate;
6. Ohio university affirms and declares that, to fulfill the function described in section D(5) of this policy, Ohio university shall ensure the fullest degree of intellectual diversity;
7. Ohio university affirms and declares that faculty and staff shall allow and encourage students to reach their own conclusions about all controversial beliefs or policies and shall not seek to indoctrinate any social, political, or religious point of view;
8. Ohio university will demonstrate intellectual diversity for course approval, approval of courses to satisfy general education requirements, student course evaluations, common reading programs, annual reviews, strategic goals for each department, and student learning outcomes.

Sections D(5) to D(8) of this policy do not apply to the exercise of professional judgment about how to accomplish intellectual diversity within an academic discipline, unless that exercise is misused to constrict intellectual diversity.

9. Ohio university declares that it will not endorse or oppose, as an institution, any controversial belief or policy, except on matters that directly impact Ohio university's funding or mission of discovery, improvement, and dissemination of knowledge. Ohio university may endorse the congress of the United States when it establishes a state of armed hostility against a foreign power.
10. This section does not include the recognition of national and state holidays, support for the Constitution and laws of the United States or the state of Ohio, or the display of the American or Ohio flag.

Ohio university affirms and declares that it will not encourage, discourage, require, or forbid students, faculty, or administrators to endorse, assent to, or publicly express a given ideology, political stance, or view of a social policy, nor will Ohio university require students to do any of those things to obtain an undergraduate or post-graduate degree.

Sections D(9) and D(10) of this policy do not apply to the exercise of professional judgment about whether to endorse the consensus or foundational beliefs of an academic discipline unless the exercise is misused to take an action prohibited in section D(9).

11. Ohio university prohibits political and ideological litmus tests in all hiring, promotion, and admissions decisions, including diversity statements and any other requirement that applicants describe their commitment to any ideology, principle, concept, or formulation that requires commitment to any controversial belief or policy.
12. Ohio university affirms and declares that no hiring, promotion, or admission process or decision shall encourage, discourage, require, or forbid students, faculty or administrators to endorse, assent to, or publicly express a given ideology or political stance.
13. Ohio university affirms and declares that it will not use a diversity statement or any other assessment of an applicant's political or ideological views in any hiring, promotions, or admissions process or decision.
14. Ohio university affirms and declares that no process or decision regulating conditions of work or study, such as committee assignments, course scheduling, or workload adjustment policies, shall encourage, discourage, require, or forbid students, faculty, or administrators to endorse, assent to, or publicly express a given ideology or political stance.
15. Ohio university affirms and declares that it will seek out invited speakers who have diverse ideological or political views.
16. Ohio university will post prominently on our website a complete list of all speaker fees, honoraria, and other emoluments in excess of five hundred dollars for events that are sponsored by the university. That information shall be all of the following:
 - a. Accessible from the main page of its website by use of not more than three links;
 - b. Searchable by keywords and phrases;
 - c. Accessible to the public without requiring user registration of any kind.

E. Requirements for positions, policies, programs, and activities

As required by section 3345.88 of the Revised Code, Ohio university shall do the following:

1. With respect to every position, policy, program, and activity, Ohio university shall do both of the following:
 - a. Treat all faculty, staff, and students as individuals, hold every individual to equal standards, and provide those individuals with equality of opportunity, with regard to those individuals' race, ethnicity, religion, sex, sexual orientation, gender identity, or gender expression;
 - b. Provide no advantage or disadvantage to faculty, staff, or students on the basis of race, ethnicity, religion, sex, sexual orientation, gender identity, or gender expression in admissions, hiring, promotion, tenuring, or workplace conditions.
2. Ohio university shall not provide or require training for any administrator, teacher, staff member, or employee that advocates or promotes any of the following concepts:
 - a. One race or sex is inherently superior to another race or sex.
 - b. An individual, by virtue of her or his race or sex, is inherently racist, sexist, or oppressive, whether consciously or unconsciously.
 - c. An individual should be discriminated against or receive adverse treatment solely or partly because of the individual's race.
 - d. Members of one race cannot nor should not attempt to treat others without respect to race.
 - e. An individual's moral standing or worth is necessarily determined by the individuals' race or sex.
 - f. An individual, by virtue of the individual's race or sex, bears responsibility for actions committed in the past by other members of the same race or sex.
 - g. An individual should feel discomfort, guilt, anguish, or any other form of psychological distress on account of her or his race or sex.
 - h. Meritocracy or traits such as hard work ethic are racist or sexist, or were created by members of a particular race to oppress members of another race.
 - i. Fault, blame, or bias should be assigned to a race or sex, or to members of a race or sex because of their race or sex.

This section shall not be constructed to preclude Ohio university from providing or facilitating continuing education that complies with this policy's requirements to public safety officers.

3. Ohio university shall prohibit all policies designed explicitly to segregate faculty, staff, or students based on those individuals' race, ethnicity, religion, sex, sexual orientation, gender identity, or gender expression in credit-earning classroom settings, formal orientation ceremonies, and formal graduation ceremonies.

F. Exceptions

1. Nothing in this policy prohibits faculty or students from classroom instruction, discussion, or debate, so long as faculty members allow students to express intellectual diversity.
2. Nothing in this policy prohibits Ohio university from complying with any state or federal law to provide disability services or to permit student organizations, including fraternities and sororities.

G. Reporting Violations

Faculty, students and student groups may use any of the options below to submit a complaint about an alleged violation of this policy by an Ohio university employee or student. Reports may be submitted regarding any alleged violation.

1. Report online using the Advance Ohio Higher Education Act grievance form by clicking on submit report at <https://www.ohio.edu/civil-rights>. Reports submitted online are routed immediately to the director of university civil rights compliance (CRC).
2. File a report with CRC by mail, phone, or email. A report may be submitted at any time (including during non-business hours) using the contact information below. Reports may also be made in person at the CRC office on business days when a staff member is available.

University civil rights compliance
006 Lindley hall
Ohio university
Athens, OH. 45701
740.593.9140 (phone)
civilrights@ohio.edu

H. Investigation and adjudication

Investigation and adjudication of complaints under this policy will be conducted pursuant to the Advance Ohio Higher Education Act grievance process (linked from the references part of this policy). This process shall state the range of disciplinary sanctions for a violation of this policy.

Forms, References, and History

1. Forms

The following form is specific to this policy:

The Advance Ohio Higher Education Act Grievance Form by clicking on Submit Report at <https://www.ohio.edu/civil-rights>.

2. References

The following items are relevant to this policy:

The Advance Ohio Higher Education Act, SB1, 136th General Assembly

The Advance Ohio Higher Education Act Grievance Process

3. History

18.011 - Annual Faculty Performance Evaluation

Status:

Effective:

Approved by:

Signatures and dates on archival copy

A. PURPOSE

This policy is established to ensure compliance with the requirements of section [3345.452 of the Revised Code](#), which mandates that all full-time faculty directly compensated by the university undergo annual performance evaluations using standardized, objective, and measurable criteria.

B. SCOPE

This policy applies to all full-time faculty members compensated directly by Ohio university, including those in tenure track, instructional, and clinical faculty classifications, as defined in the *Ohio university faculty handbook*. For the purposes of this policy, full-time faculty members refer to Ohio university employees with 0.8 FTE (full-time equivalent) appointments who are designated as having faculty status per the *Ohio university faculty handbook*.

C. POLICY STATEMENT

This policy encompasses annual performance evaluations and related administrative processes.

1. Requirement

Ohio university shall conduct an annual performance evaluation for each full-time faculty member who it directly compensates.

2. Evaluation

a. Department/school oversight

Department chairs, school directors, or equivalent administrators are responsible for conducting annual evaluations, utilizing departmental committees that adhere to established written procedures.

b. Evaluation criteria

Evaluations must be comprehensive and include standardized, objective, and measurable performance metrics.

c. Evaluation areas

Each evaluation must assess performance in any area where the faculty member has devoted at least five per cent of their annual work time, including teaching, research/scholarship/creative activity, service, clinical care, administration, and other categories as determined by the university.

d. Performance assessment

Each evaluation shall include a summary assessment of the performance areas listed above, using the parameters: "exceeds performance expectations," "meets performance expectations," or "does not meet performance expectations."

e. Student evaluations

Student evaluations conducted pursuant to section 3345.451 of the Revised Code 3345.451 shall account for at least twenty-five per cent of the teaching area component of the evaluation.

f. Projected work effort distribution

Each evaluation shall establish a projected work effort distribution for the faculty member for the next year, compliant with the university's established workload policies adopted under section 3345.45 of the Revised Code and approved by the college dean or equivalent.

3. Evaluation review and approval

Evaluations shall be conducted by the department chair, school director, or equivalent administrator, reviewed and approved or disapproved by the dean, and submitted to the provost for review. If there is disagreement between the chair/director and dean, the provost shall have final decision authority.

4. Appeals

Faculty members may appeal evaluation outcomes through established grievance procedures.

5. Documentation and record-keeping

Evaluation letters and related documents shall be maintained in faculty personnel files, accessible to authorized personnel involved in employment, salary, or promotion decisions.

18.012: Faculty Tenure

Status:

Effective:

Approved by:

Signatures and dates on archival copy

A. PURPOSE

This policy ensures compliance with the requirements of section [3345.454 of the Revised Code](#), which mandates that each state institution of higher education develop a policy for faculty tenure.

B. SCOPE

This policy applies to all tenure-track faculty at Ohio university, including those in all academic departments, schools, and colleges offering tenure-eligible appointments.

C. POLICY STATEMENT

1. Considerations

Tenure is awarded to those individuals whose records indicate that they are likely to continue to make significant positive contributions to the academic life of the university throughout their professional careers, in accordance with department/school/college policy.

2. Differential workload distributions

Tenure track faculty may be hired on differential workload distributions as appropriate to meet the needs of the department/school, but all should contribute to the teaching, research and service missions of the university.

3. Eligibility

Eligibility for tenure shall be determined by the department concerned and is reserved for those who are engaged in academic activities, including research, and/or scholarly activity, and/or creative activity (of which any may include activities leading to commercialization), teaching, and service.

4. Criteria

The criteria used to make decisions on promotion and tenure must originate in the department or school in consultation with the dean. The faculty should review these criteria periodically in consultation with the dean of the college.

5. Pathways

Consistent with differential workload distributions, departments and schools should offer multiple pathways, one of which may be a commercialization pathway, for faculty to earn

tenure. Pathways should promote excellence in teaching, research, service, commercialization, or any combination thereof.

6. Authority

Tenure shall be granted by the president upon recommendation of the department, the dean involved, and the provost of the university. Under exceptional circumstances, tenure may be granted by the president to a person who is newly appointed to an administrative position at Ohio university and who has not been previously a member of the Ohio university faculty. Such a grant of tenure must have been approved by the department concerned, the dean concerned, and the provost of the university.

18.013: Post-Tenure Review

Status:

Effective:

Approved by:

Signatures and dates on archival copy

A. PURPOSE

This policy establishes procedures for post-tenure review at Ohio university in accordance with section [3345.453 of the Revised Code](#). The policy ensures institutional compliance with statutory requirements while preserving principles of due process and academic freedom.

B. SCOPE

This policy applies to all tenured Ohio university faculty members with faculty status, per the *Ohio university faculty handbook*.

C. POLICY STATEMENT

The policy outlines conditions under which post-tenure review is triggered, the timeline and process for conducting the review, and potential outcomes.

1. Requirement

Ohio university shall conduct a post-tenure review for each tenured faculty member under the conditions described below.

2. Conditions for triggering post-tenure review

- a. A post-tenure review must be conducted if a tenured faculty member receives a “does not meet performance expectations” rating within the same evaluative category at least two of the past three consecutive annual performance evaluations.
- b. A post-tenure review must be conducted if a faculty member maintains tenure after a post-tenure review and receives an additional “does not meet performance expectations” rating in any area of the annual performance evaluation within the next two years.
- c. A post-tenure review may be initiated at any time, for cause, by the department chair / school director, college dean, or the executive vice president and provost if the faculty member has a documented, sustained record of significant underperformance outside the annual evaluation process. For-cause post-tenure reviews shall not be based on a faculty

member's allowable expression of academic freedom as defined by Ohio university policy or Ohio law.

3. Review process timeline

The post-tenure review process, from initiation to conclusion, shall not exceed six months. A one-time, two-month extension may be granted by the president of Ohio university.

4. Outcomes and administrative action

Following the completion of the review, the executive vice president and provost shall submit a recommended outcome to the president for final decision. Permissible administrative actions include censure, required remedial training or mentoring, for-cause termination, regardless of tenure status, and/or other actions permitted under university policy.

5. Appeals

Faculty members who receive a recommendation for administrative action as a result of a post-tenure review may appeal outcome(s) through established grievance procedures.

6. Documentation and record-keeping

Post-tenure review and related documents shall be maintained in faculty personnel files, accessible to authorized personnel involved in employment, salary, or promotion decisions.

18.014 - Faculty Retrenchment

Status:

Effective:

Approved by:

Signatures and dates on archival copy

A. PURPOSE

This policy ensures compliance with the requirements of [section 3345.454 of the Revised Code](#), which mandates that each state institution of higher education develop a policy for faculty retrenchment.

B. SCOPE

This policy applies to all full-time faculty members holding tenured, tenure-track before the end of the contract period, or renewable term appointments before the expiration of the specified term at Ohio university. For the purposes of this policy, full-time faculty refers to employees of the university with 0.8 FTE (full-time equivalent) appointments at Ohio university and are designated as having faculty status per the *Ohio university faculty handbook*.

C. POLICY STATEMENT

1. Definitions

- a. As defined in section 3345.454 of the Revised Code, “retrenchment” means a process by which a state institution of higher education reduces programs or services, thus resulting in a temporary suspension or permanent separation of one or more institution faculty, to account for a reduction in student population or overall funding, a change to institutional missions or programs, or other fiscal pressures or emergencies facing the institution.
- b. As described in the *Ohio university faculty handbook*, a program is defined as a course of studies leading to a degree (including an associate degree), a recognized major under a degree, or an option or concentration under a degree that is generally comparable to a major at the university.

2. Grounds for retrenchment

The Ohio university board of trustees may implement a temporary suspension or permanent separation of one or more faculty members to account for one or more of the following:

- a. A reduction in student population
- b. A reduction in overall funding

- c. A change to the institutional mission or programs
- d. Other fiscal pressures or emergencies facing the institution

3. Authority

The Ohio university board of trustees has the final authority on retrenchment decisions made under this policy.

4. Commitment to academic values

Ohio university reaffirms its commitment to academic freedom and shared governance. No faculty reduction under this policy shall be based on a faculty member's exercise of academic freedom or constitutionally protected speech.

18.009: Faculty Workload

Status:

Effective:

Approved by:

Signatures and dates on archival copy

A. Purpose and Scope

The purpose of this policy is to comply with standards for instructional workloads for faculty as described in [section 3345.45 of the Revised Code](#).

This policy establishes a comprehensive framework for assigning and managing faculty workloads at Ohio university. The policy applies to all faculty types across all colleges and campuses of Ohio university. It sets clear expectations for teaching, research/scholarship/creative activity (RSCA), service, and administration workloads in compliance with the Revised Code and Ohio university standards.

This policy supersedes any conflicting departmental or college guidelines and is not subject to collective bargaining negotiation. It will be reviewed and updated at least once every five years, with approval by the board of trustees, and will be publicly accessible as required by law.

All workload assignments must be free from political or ideological considerations in accordance with [section 3345.0217 of the Revised Code](#) [Ohio Revised Code 3345.0217](#).

The intent of this policy is not to require the same level and type of activity of every faculty member but to recognize that differentiation of roles is necessary to allow departments/schools, colleges, or equivalent academic units to carry out their mission.

B. Definitions

- a. **Faculty:** Faculty refers to all persons holding faculty appointments with faculty rank and faculty status.
- b. **Credit hour:** as defined in 34 C.F.R. 600.2, a credit hour reflects an amount of work represented in intended learning outcomes and verified by evidence of student achievement. This policy uses credit hours as the standard unit for measuring all faculty workload elements, including teaching and equivalents for RSCA, service, administration, and other duties.
- c. **Full-time workload (nine-month):** The full-time faculty workload is defined as thirty credit hours per academic year (two semesters). This represents a baseline one hundred per cent workload dedicated entirely to teaching (with no RSCA or service duties). All full-time faculty

workload allocations for teaching, RSCA, service, administration, and other duties are proportional to this thirty-credit baseline.

- d. **Teaching, RSCA, service (TRS) ratio:** The percentage breakdown of a faculty member's effort across teaching, RSCA, and service. For example, a TRS of sixty-thirty-ten indicates sixty per cent teaching, thirty per cent RSCA, ten per cent service. All TRS allocations refer to portions of the thirty-credit full-time workload standard.
- e. **Justifiable credit hour equivalencies:** All components of workload must be translated into credit hour equivalencies to facilitate fairness and compliance. RSCA, as well as service and administrative duties, are assigned credit-hour values as justifiable credit-hour equivalencies (CHE) that count toward the thirty-credit full-time load.
- f. **Annual assignment and review:** Each faculty member's workload distribution is initially set in the letter of offer or appointment and reviewed (and revised, when appropriate) annually as part of the annual performance evaluation process.
- g. **Workload equity and flexibility:** While this policy provides standard expectations, it allows flexibility to accommodate individual strengths, varying disciplines, and evolving responsibilities. Department chairs, school directors, or equivalent academic unit leaders may recommend, with dean approval, adjusted allocations (different TRS ratios) for individual faculty to support greater emphasis on teaching, RSCA, service, or administration, as long as the unit meets its overall instructional obligations. Any such differential assignments must be documented and aligned with the unit's mission and needs.

B. Distribution of effort

Teaching, RSCA, and service, each broadly defined, constitute the three major areas of faculty responsibility. The educational responsibility of faculty includes more than the hours directly spent in classroom instruction and scholarship. Other factors to be considered include class preparation; grading and other forms of evaluation of students' work; thesis and dissertation direction; academic advising of students; laboratory, studio, or practicum requirements; size of classes; availability and use of teaching assistants. Service includes assistance to the public and the profession and the community in the form of professional activities external to the university. RSCA includes a variety of professional, research, scholarly, and creative activities. At its best, these three dimensions of faculty effort are mutually reinforcing.

Adjustments to baseline teaching loads must be based on justifiable credit hour equivalencies (CHE) important to fulfilling the educational mission of the university. Justifiable CHE may include (but are not limited to) teaching unusually large class sections or classes with an unusually large number of contact hours relative to credit hours; effective use of high-impact teaching practices, teaching innovations, or time-intensive instructional pedagogies; unusually high number of different course preparations or significant curriculum/course development; direction of special studies, community engaged research, experiential learning, or undergraduate/graduate research; active RSCA programs with significant outcomes; significant, documented investments in RSCA development; and

meaningful service assignments/expectations, professional development activities, or administrative duties.

Annual TRS workload assignments and corresponding performance expectations must be defined using a combination of instructional credit hours and justifiable credit hour equivalents (CHE) using full-time workload as the baseline.

Quantitative standards for teaching, RSCA, and service/administration may be weighted for individual faculty upon recommendation of chairs and directors and approval by the dean to reflect the particular strengths/interests of faculty and department/school needs. For example, a faculty member may have a higher percentage of effort directed toward teaching, with a corresponding decrease in RSCA and service expectations. Faculty with major RSCA commitments may negotiate reductions in the other areas of faculty responsibility in order to devote more effort to RSCA.

C. College and department responsibility for policies

Each college, or equivalent unit having permanent faculty, shall develop a policy on faculty workload that will allow for differentiation of mission for departments and schools within the college and for faculty within the departments and schools. The college policy should allow for flexibility and for ranges in teaching, RSCA, and service/administration expectations. The college document shall be developed in consultation with chairs/directors or a faculty advisory committee and be subject to approval by the provost.

In line with the narrative criteria prescribed by the college guidelines, each department, school or equivalent unit will develop a workload policy that ensures that the department or school meets standards appropriate to its mission. Within the department or school there may be significant differences in the assignment of responsibilities to individual faculty members so long as the department or school is able to meet its responsibilities for instruction.

Department and school policies are subject to approval by the college dean (or equivalent). In general, it is expected that the mission of the academic unit and level of programs offered will determine the relative balance of teaching to RSCA and service/administration. Typically, units with an associate degree or two-year programs will be expected to devote eighty to ninety per cent of effort to teaching. Programs with a baccalaureate program will devote seventy to eighty per cent of effort to teaching. Departments with an active master's program will be expected to devote sixty to seventy per cent departmental workload to teaching. Departments with active doctoral/terminal degree programs will be expected to devote fifty to sixty per cent of departmental workload to teaching. These percentages are applied as thresholds at the department or school level to ensure the department's appropriate balance of teaching relative to RSCA and service.

D. Policy guidelines

Each college, or equivalent unit having faculty, will develop faculty workload guidelines in line with the standards of this policy. These guidelines will reflect the fact that a well-articulated statement of faculty workload will allow individual faculty, the academic unit, and its college to understand how each contributes to the accomplishment of the university's mission.

- a. Tenure-track (probationary) and tenured faculty are expected to contribute to all three areas: teaching, RSCA, and service. The baseline TRS ratio for tenured/tenure-track faculty is eighty-ten--ten, with a maximum of twelve credit hours of instruction per semester (or twenty-four per year). Tenure-track/tenured faculty with more RSCA and/or service/administration expectations, based on justifiable credit-hour equivalencies (CHE), should have corresponding reductions to the baseline teaching workload.
- b. Instructional (non-tenure-track) faculty focus on teaching and service (if applicable) and do not have RSCA as part of their workload. The baseline teaching load for instructional faculty with no service expectation (one hundred per cent teaching) is fifteen credit hours per semester (or thirty per year). Instructional faculty with service/administration and/or professional development/qualification expectations, based on justifiable as credit-hour equivalencies (CHE), should have corresponding reductions to the baseline teaching load.
- c. Clinical (non-tenure-track) faculty workload may include a combination of teaching, service, RSCA, and clinical practice or supervision. The baseline teaching load for clinical faculty with no RSCA or service expectation (one hundred per cent teaching) is fifteen credit hours per semester (or thirty per year). Clinical faculty with clinical practice, RSCA, service/administration, and/or professional development/qualification expectations, based on justifiable as credit-hour equivalencies (CHE), should have corresponding reductions to the baseline teaching load.
- d. Part-time faculty (instructors) should be assigned a proportional workload determined by the number of credit hours taught relative to the full thirty-credit hour annual load.
- e. Visiting faculty TRS workloads should be determined on a case-by-case basis referencing the above distinctions.

Forms, References, and History

1. Forms

There are no forms that are specific to this policy.

2. References

The following items are relevant to this policy:

None

3. History

Draft versions of this policy that were circulated for review, their cover memos, their forms, and Reviewers' comments on them are available on the [password-protected Review site](#).

Prior versions of this policy were approved on:

1. April 13, 2021 (re-formatted)
2. June 25, 1994