WHAT IS INSTRUCTIONAL WORKLOAD?

- Instructional Workload is an annual process where we track the workload of faculty and instructors in academic departments and curricula. It also provides information about how departments use their instructional budget funding.
The UNC Board of Governor's developed a policy in 2014 that requires the University to implement policies and procedures to monitor faculty teaching loads and account for any variations within their expected workload.

- As a part of the Board of Governor's policy we are required to have a standard methodology for collecting data to monitor teaching loads, and to implement an annual evaluation of all aspects of faculty workload.

- Provides course data and workload assignments for faculty and instructors (including fixed-term faculty and students).

- Serves as a permanent record of teaching responsibilities for faculty and instructors on state funds.

- We report on this information during our accreditation process.
WHAT IS THE GOAL OF INSTRUCTIONAL WORKLOAD?

- Verify faculty salary savings
- Enter unit funding data
- Adjust course workloads
- Ensure that the remainder amount comes within $500 of the carryover transferred to/from program C1302 (which also reconciles to ConnectCarolina and Infoporte).

<table>
<thead>
<tr>
<th>Allocation</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent Allocation</td>
<td>$142,752.00</td>
</tr>
<tr>
<td>Faculty and Chair Savings</td>
<td>$95,352.00</td>
</tr>
<tr>
<td>Arts and Sciences Funding</td>
<td>$175,034.00</td>
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<tr>
<td>Unit Funding</td>
<td>$5.00</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Available Allocation</th>
<th>$413,138.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spending</td>
<td>$228,161.00</td>
</tr>
</tbody>
</table>

| Remainder                  | $184,977.00 |

Carryover transferred to/from program C1302 in 2017: $184,971.00
WHERE DOES THE DATA COME FROM?

- Unit Funding: Commitments database
- Permanent Faculty Salary: Dean’s Office EPA database
- Carryover: CAS-State Funds Carryover Report
- Leaves/Buyouts: Manual load from Dean’s Office spreadsheet and leave database
- Instructional Spending:
  - Amount Paid: Actuals from Infoporte (program C1302/C1303)
  - Course Workload: Census Course database
- Chair Savings: Permanent stipends from Dean’s Office EPA database
- Teacher of Record: Infoporte HR, Census Course database and Production Course database
WHAT IS THE TIMELINE? WHO IS INVOLVED?

❖ Step 1 - Data Load
   ▪ DO Finance Team works with OASIS to prepare/review/load the data into the Instructional Workload system.
   ▪ System open date was Friday, October 13th for department entry

❖ Step 2 - Department Entry
   ▪ Under the ‘Savings’ tab, the manager will make adjustments to the following:
     ▪ Perm/EPA Detail
     ▪ Chair Savings (only if Admin Appointments (ie:Chair, DGS, DUGS) went on leave)
     ▪ Instructional Spending
     ▪ Teacher of Record
   ▪ Help Sessions will be held by the Dean’s Office on the following dates for any questions during the Department Entry process.
     ▪ Friday, October 20th
     ▪ Thursday, October 26th
   ▪ Department Deadline for Completion is Friday, November 3rd
WHAT IS THE TIMELINE? WHO IS INVOLVED? (CONTINUED)

▶ Step 3 – Chair’s Review
  ▪ During this time the Chair will review the Instructional Workload and may request additional adjustments to be made.
  ▪ The Chair will approve the IWL & it will then move on to the SAD for final approval.
  ▪ Chair’s Deadline for approval is Friday, November 17th

▶ Step 4 – Senior Associate Dean’s Review
  ▪ During this time the SAD will review the Instructional Workload and may request additional adjustments.
  ▪ SAD’s deadline for FINAL approval is Friday, December 1st
TIPS/BEST PRACTICES