

# Geography & Environmental Studies

## Academic Workload Policy

### 1. Overview.

The Department of Geography and Environmental Studies (GES) standards and expectations for faculty are outlined in its Faculty Governance Document Section V (Standards and Expectations for Faculty).

This policy further outlines an Academic Workload Policy<sup>1</sup> in accordance with UA-UNM Collective Bargaining Agreement (CBA), Unit 1 Article 13 – Academic Workload. This policy supersedes any relevant and overlapping elements of the GES Faculty Governance Document.

Workloads for faculty are comprised of a combination of teaching, scholarly work (that is, research), and service. The activities associated with these three workload activity areas are generally summarized as:

- Teaching is understood to include all activities associated with the instruction of students. Teaching duties extend outside of the classroom and include, but are not limited to: instruction of classroom courses (as defined below); instruction of individualized courses, such as thesis, dissertation, independent study, and special problems credits; the preparation or revision of syllabi, assignments, and other materials; grading student work; holding group or individual office hours; evaluation of student progress toward learning objectives; mentoring of students; writing letters of recommendation; assessing departmental and statewide learning objectives; advisement of students, including BA/BS Honors students and graduate students at all levels; participation in Masters or PhD committees; supervision of Teaching Assistants and/or other instructors; and other similar activities.
- Scholarly work is also referred to as “scholarship” or “research” in relevant governance documents at UNM. In departmental governance documents, “research” is the preferred term. Research is understood to include any work carried out and documented by departmental faculty to produce and disseminate new knowledge or creative works. Examples of research may include: laboratory, field-based, library-based, or archive-based work; community-based scholarship; pedagogical research; publication; development and sharing of creative works, whether in physical or digital formats; exhibitions, whether in physical or digital formats; grant writing and principal investigator (PI) duties; supervision and mentoring of student researchers; and public presentation of research at conferences and other meetings.
- Service is understood to include any activity performed by a faculty member that meets these general criteria: 1) the activity does not fall into the definitions of teaching or research; and either 2) the activity is oriented towards supporting the full and effective functioning of the department, institution, or academic discipline or academic community more broadly; or 3) the activity is oriented toward serving the public and broader community beyond the

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<sup>1</sup> This Academic Workload Policy supersedes the Variable Workload Policy Adopted by vote of the GES Faculty, 28 April 2016. This Academic Workload Policy was adopted, with revisions, by faculty vote on 28 February 2022.

academy. Service activities may include, but are not limited to: participation in shared governance; participation in department-, campus-, and system- wide committees; provision of mentoring to faculty colleagues and/or administrative staff; participation in faculty assembly meetings; participation in departmental meetings; participation in graduation ceremonies; participation in student recruitment activities; participation in recruiting and hiring activities for faculty and staff; participation in tenure and promotion panels; advising or providing expertise to UNM initiatives; community, regional, national, or global service engagements; activity in national and international societies in the academic and/or professional fields of the member; organization of conferences; peer review of scholarly works; acting as a journal editor; acting as a jurist for creative works exhibitions; and organization or participation in community outreach events.

Individual workloads can vary annually for every faculty member, but the standard workload for permanent faculty is summarized in Table 1. Standards and expectations for satisfying these workload norms are described in the Faculty Governance Document Section V (Standards and Expectations for Faculty). This workload policy provides departmental guidance regarding when and how to make variations from this standard academic workload and to outline the process for conducting the annual workload review for each member of the faculty.

Table 1. Workload norms by faculty title and rank. These norms apply only to tenure-track Professors and permanent, non-tenure-track Lecturers.

<b>Faculty rank</b>	<b>Teaching/ Research/ Service percentages</b>	<b>Summary of expected activities</b>
Assistant Professor	40/40/20	<p>Teaching: Instruct three classroom courses per academic year, participate in student advisement and mentoring, and gain pedagogical experience and training as needed. Give equal attention to graduate and undergraduate education.</p> <p>Research: Maintain an active scholarly agenda that includes publishing, seeking research funding, presenting research publicly, and mentoring of student researchers.</p> <p>Service: Gain increasing knowledge of institutional governance by participating in departmental governance.</p>
Associate Professor	40/40/20	<p>Teaching: Instruct three classroom courses per academic year, engage actively in student advisement and mentoring, and develop pedagogical skills through training and experience. Give equal attention to graduate and undergraduate education.</p> <p>Research: Maintain an active scholarly agenda that includes publishing, seeking research funding, presenting research publicly, mentoring of student researchers, and developing leadership skills in research activities.</p> <p>Service: Develop and exhibit leadership skills in institutional governance by seeking roles in campus and departmental governance.</p>

Faculty rank	Teaching/ Research/ Service percentages	Summary of expected activities
Professor	40/40/20	<p>Teaching: Instruct three classroom courses per academic year, engage actively and show leadership in student advisement and mentoring, and exhibit pedagogical expertise. Give equal attention to graduate and undergraduate education.</p> <p>Research: Maintain an active scholarly agenda that includes publishing, seeking research funding, presenting research publicly, mentoring of student researchers, and showing leadership in research activities.</p> <p>Service: Show leadership in institutional governance by seeking roles in campus and departmental governance, and in broader academic contexts.</p>
Lecturer (I, II, and III)	80/0/20	<p>Teaching: Instruct eight classroom courses per academic year, and develop pedagogical skills through training and experience. Focus on undergraduate education.</p> <p>Research: No research expectations.</p> <p>Service: Gain increasing knowledge of institutional governance by participating in departmental governance, with an emphasis on student-support activities.</p>
Senior Lecturer (I, II, and III)	80/0/20	<p>Teaching: Instruct eight classroom courses per academic year, exhibit and continue to develop pedagogical expertise, and develop leadership skills in pedagogical activities. Focus on undergraduate education.</p> <p>Research: No research expectations.</p> <p>Service: Develop and exhibit leadership skills in institutional governance by seeking roles in campus and departmental governance, with an emphasis on student-support activities.</p>
Principal Lecturer (I, II, and III)	80/0/20	<p>Teaching: Instruct eight classroom courses per academic year, exhibit and continue to develop pedagogical expertise, and show leadership skills in pedagogical activities. Focus on undergraduate education.</p> <p>Research: No research expectations.</p> <p>Service: Show leadership in institutional governance by seeking roles in campus and departmental governance, and in broader academic contexts.</p>

## 2. Standard teaching expectations in terms of workload.

This policy incorporates by reference the teaching expectations set forth in the GES governance document, including those by rank. See Table in Appendix A.

As a general matter, all faculty are expected to provide quality instruction that is fair and efficacious. This means that, at a minimum and in every course, faculty members must provide to students, and adhere to, a syllabus that specifies course expectations and requirements.

This policy provides additional guidance with respect to teaching load.

First, the teaching load of faculty members includes classroom teaching and other instructional activities. A “classroom course” is defined as scheduled and supervised instruction that generates student credit hours, and that may be delivered in face-to-face, remote, online, or hybrid formats. Classroom courses do not include individualized and/or unsupervised instruction, such as independent study or thesis research courses, which are examples of “other instructional activities”. Additionally, “one” classroom course equals a 3- or 4-credit course, or a combination of 1- or 2-credit courses that together yield 3 or 4 credits. A faculty member’s “courseload” are those classroom courses that are assigned to the faculty member during an academic year by the Department Chair. The normal, expected courseload of tenure-track faculty is three courses per academic year; the normal, expected courseload of permanent, non-tenure-track faculty is eight courses per academic year. A courseload includes only those classroom courses for which the faculty member is the instructor of record. If a faculty member supervises Teaching Assistants or instructors of record (which may include temporary instructors, Visiting faculty, or others), the relevant courses are not a part of the courseload of the supervising faculty member; such supervision contributes to the “other instructional activities” of a faculty member.

Second, a faculty member’s courseload can vary (that is, increase or decrease) per semester through administrative, contractual, or funding agreements of various types. With the exceptions of formal leaves or atypical circumstances, full-time faculty must instruct at least one classroom course each semester. In all cases, any actual change in expected teaching workload must be determined through discussion among the effected faculty member, the Personnel Committee, the Department Chair, and the CAS, and must adhere to all applicable rules, guidelines, and policies. Courseload variations are further described below.

Third, a faculty member whose normal in-load course is cancelled because of low enrollment or other circumstances will be expected to make up that element of teaching workload either by teaching an alternative in-load course during the same semester or an additional in-load course during the subsequent term, or by undertaking a service assignment within the department. If a make-up course is taught during a subsequent summer or intersession term, the faculty member shall receive no additional compensation that may be normally associated with teaching summer or intersession courses.

Fourth, to ensure that students at all levels have the opportunity to learn directly from faculty members, and that all students have an opportunity to take courses from any faculty member, it is expected that full-time, tenure-track faculty:

- teach undergraduate and graduate students, primarily through classroom courses, but also through other instructional activities;
- participate on undergraduate Honors committees, and graduate committees of study (including thesis, project, examination, and dissertation committees), particularly within the department but also in support of other academic units at the UNM;

- post and hold office hours for students, whether these are at regularly scheduled times or by appointment, and whether in person or through real-time (live) interaction via telephone, the Internet, or some other means;
- respond to student inquiries, requests, and complaints in timely manners; and
- make necessary efforts to accommodate student learning needs, particularly in coordination and communication with the UNM Accessibility Resource Center.

Expectations for accessibility for students are similar for Lecturers. In contrast to tenure-track faculty, Lecturers should:

- emphasize undergraduate teaching; and
- emphasize classroom courses rather than other instructional activities.

The UNM Office of Graduate Studies (OGS) specifies that Lecturers may not chair graduate committees, but can serve as voting members under specific conditions defined by OGS. Lecturers may chair undergraduate Honors committees and oversee undergraduate capstone projects.

**2.2 Voluntary Teaching Increase.** Tenured faculty members and Lecturers may voluntarily seek and/or accept, without supplemental compensation (see section 2.5, below), an increased teaching workload in order to focus overall work effort on teaching, or to achieve some other purpose. When a faculty member chooses to adopt a higher classroom teaching load, this must be documented through a signed agreement with the Department Chair, kept on file in Department. The signed agreement should state any related changes in service and/or teaching workload, as well as any other factors related to the workload change.

**2.3 Triggering Mechanism for Additional Teaching.** Tenured faculty members who do not meet departmental “effectiveness” standards for research and/or service for two consecutive years may be assigned increased teaching loads, at the discretion of the Department Chair in consultation with the department’s Personnel Committee. The processes for evaluating research effectiveness and teaching effectiveness, including faculty rebuttal processes, are described in the Annual Evaluations of Faculty portion of the department’s Faculty Governance Document. When a faculty member’s courseload is increased through this triggering mechanism, this change must be documented by the Department Chair, and all relevant documentation (including prior annual reviews) must be provided in full to the faculty member in question, kept on file in Department, and forwarded to CAS. The documentation must specify conditions that must be met for the faculty member in question to return to their prior courseload.

Any increased courseload triggered in this way will take effect at the beginning of the next academic year (AY). The increase in the first year will be one additional classroom course. If the conditions for return to the prior courseload are not met in year one, in year two the courseload will increase again by one additional course. The resulting, increased courseload would continue until the conditions for return to the prior courseload are met.

When an increased courseload is initially triggered for any faculty member, the faculty member in question may request in writing to the Department Chair a one-year delay to the initial courseload increase. Barring exceptional circumstances, no more than one such delay will be granted to the same faculty member within any five-year period. The faculty member should work with the Chair

to develop and implement plans for reinvigorating the faculty member's research program; the Chair and Personnel Committee should also initiate an appropriate mentoring process for the faculty member. It is expected that any request for a one-year delay should be granted, conditional on the faculty member submitting a plan for current and future research activities. If conditions for return to the prior courseload are met during the one-year delay, no increase to the faculty member's courseload should be initiated.

## **2.4 Courseload Reductions.**

Courseload reductions may be justified under a variety of circumstances. Four broad categories of courseload reduction are identified herein.

First, four types of courseload reduction are normally assigned to all faculty who qualify:

- All newly hired faculty of all ranks and titles are eligible to receive two one-course reductions, usually within the first two years of service, for course development.
- All newly hired, pre-tenure, tenure-track faculty are eligible to receive a "Research Semester" of two one-course reductions, usually taken during one academic year, to focus their work effort on research activities in the period of years prior to the year of tenure and promotion review. This type of course reduction is described in the CBA article 10.
- The Department Chair is assigned a one-course reduction per semester to support effectiveness in completion of the responsibilities of the service position.
- All faculty who successfully complete a full term of a major service position associated with a College- or University-funded SAC are eligible to receive two one-course reductions, usually taken during one academic year, to refocus their work effort on research and teaching activities. Relevant service position titles include, but are not limited to, Department Chair, Director of an academic program, Dean or Associate Dean, and Provost or Associate Provost.

Second, the Department Chair shall recognize, accept, and act upon course releases requested by UNM administrative units outside the department, including the College and Provost's Office. In this category are included courseload reductions requested by a Dean or the Provost for faculty completing administrative service roles; sabbatical leaves; leaves without pay; and other forms of courseload reduction that may be authorized or serve needs outside of the department. When such courseload reductions are requested, the Department Chair shall seek from the relevant administrative unit funding for temporary instructors to offset the loss of instructional capacity produced.

Third, the Department Chair shall allow a course release requested by any faculty member who has received research-supporting funding that can be used to pay the cost of a replacement instructor for the released course, with one exception described below. This use of research funding is called a "course buyout". The Chair may make exception to this policy in order to maintain the expectation that all faculty should teach at minimum two regular courses per academic year, in years not affected by the leaves identified in prior paragraphs of this subsection. If a faculty member is assigned course reductions for other reasons, additional course reductions based on course buyout funding may not be assigned for the requested semester. In such cases, the Chair and faculty member must negotiate an acceptable alternative use of the course buyout funding.

Finally, the Department Chair may assign course reductions at their discretion. Such reductions are normally awarded for exceptional levels and highly effective completion of research and/or service activity. The Chair may assign partial teaching load reductions (such as a one-quarter course reduction) that faculty members can accrue and convert to full, one-course reductions. The semester for which a discretionary course reduction may be assigned must be negotiated with and agreed by the Department Chair. All discretionary leaves must be justified and documented with the departmental Personnel Committee, and approved as required by College and University policies.

## **2.5 Compensation for Course Overloads.**

A faculty member who teaches one or more overload courses shall receive compensation for this work, unless the overload is the result of a voluntary choice by the faculty member, as described in section 2.2, above. The specific form of compensation shall depend upon negotiation and agreement between the faculty member and Department Chair. Such compensation might include:

- monetary payment, such as paid compensation at the appropriate part-time instructor rate;
- equivalent, in-kind reduction in future teaching load, such as a course release in the following semester;
- equivalent, exchangeable reduction in concurrent research load, meaning reduced research expectation in the current or immediately following calendar year (the time period of annual review); or
- equivalent, exchangeable reduction in concurrent service load, meaning reduced service expectation in the current calendar year (the time period of annual review).

Monetary compensation for teaching overload must be paid from department funds, if no other source of funds is available. There is no expectation that this compensation will be paid by the College directly or through temporary, part-time instructor allocations, unless approved by the Dean. If the unit cannot offer monetary compensation directly or from another source, the faculty member must be compensated by adjusting concurrent and/or future workload expectations as suggested above.

## **2.6 Courseload Reduction Request Guidelines.**

The Chair will evaluate each request for a one-course reduction according to the following guidelines.

All requests for a teaching release must provide: a) an explanation of why a temporary shift in expected workload is requested; b) documentation of reasons for increased research (or service) expectations; c) a statement on whether the requesting faculty member controls and can offer funding equal to the buyout cost of the teaching release; and d) an identification of the specific course(s) and semester(s) for which a teaching release is sought.

The Chair will return any requests that fail to provide appropriate and sufficient information and/or documentation to support the request. In such instances, the Chair will request additional supporting information and/or documentation.

Requests to buy out courses with research grants or other funds will generally be honored unless submitted too late to make arrangements for a replacement instructor, or based on the exception identified in section 2.4, above. Normally, course buyout requests must be completed prior to the eighth week of the semester preceding the semester for which a teaching release is requested. Advance notice is particularly important when the release will impact core, capstone, or specialized courses for which the pool of qualified PTIs is limited.

Any requests to buy out courses with departmental funds (or other funds internal to UNM) will be considered on a case-by-case basis. Priority will normally go to requests that are justified by major departmental service responsibilities that can be demonstrated to CAS as a justification for additional PTI funding. Only in exceptional instances will teaching releases be granted for increased service expectations associated with responsibilities outside the university.

### **3. Research and Scholarship Expectations**

This policy incorporates by reference the expectations for faculty set forth in the GES Governance document, including those by rank. See Appendix A. As a general matter, faculty with research appointments will maintain active research and scholarship agendas, including publishing their work, presenting at professional meetings and other venues, and pursuing funding as necessary to accomplish their scholarly agenda.

### **4. Service Expectations**

This policy incorporates by reference the expectations for faculty set forth in the GES Governance document, including those by rank. See Appendix A. As a general matter all faculty are expected to provide timely communication about service assignments; complete service assignments in compliance with deadlines; attend all faculty meetings, unless impossible due to professional travel or some other professional responsibility, or a major personal event; participate actively in departmental administration and governance; and; contribute generally to educational and professional outreach within and beyond UNM.

Service audits will be conducted as needed to assist the Chair in determining the overall needs of the department as well as understanding the individual service loads of faculty.

#### **4.1 Special Administrative Components (SAC)**

The Special Administrative Component (SAC) policy of the College of Arts and Sciences is incorporated into this workload policy. All SACs paid to faculty by the unit will be consistent with the College SAC policy for Category B appointments. Category B SACs are paid out of unit funds



and will not be provided by the College. If the unit cannot offer pecuniary compensation, the faculty member may be compensated in-kind by adjusting concurrent and/or future workload expectations in terms of teaching, research, and/or service.

## **5. Annual Workload Expectations Review Process**

Each year following the completion of the annual review, the Chair will conduct an annual workload expectation review for each member of the faculty. The review provides a review and approval of each faculty member's teaching, scholarly work, and service. The annual review has two components: a) review of work done consistent with the previous year's expectations established in the previous review, and b) review the current expectations and establish revised expectations for the next review cycle.

The division among these will generally vary for each member and will be based on a discussion with the member and the Chair. The academic workload expectations will be accounted for on a 100-point system. See Appendix B: Annual Workload Expectations Review Assessment Tool.

The academic workload expectations can be adjusted during an academic year in response to emergent needs and opportunities, and such adjustments should be documented. In the spirit of transparency, the workload expectations accounting for each faculty member can be made available to any member of the faculty upon request.

Appendix A: Criteria for Workload Expectations

Criteria	Workload Expectations	Expectations outlined by rank and relevant GES Governance document section					
		Assistant	Associate	Full	Lecturer	Senior Lecturer	Principal Lecturer
Teaching	V.A.2 (general; all faculty are expected to provide quality instruction that is fair and efficacious. This means that in every course, faculty members must provide to students, and adhere to, a syllabus that specifies course expectations and requirements.); see also expectations by rank in Section B)	V.B.1.(c)	V.B.2.(c)	V.B.3.(c)	See general	See general	See general
Research & Scholarship	V.A.1 (general; faculty with research appointments will maintain active research and scholarship agendas, including publishing their work, presenting at professional meetings and other venues, and pursuing funding as necessary to accomplish their scholarly agenda); see also expectations by rank in Section B)	V.B.1.(c)	V.B.2.(c)	V.B.3.(c)	See general	See general	See general
Service	V.A.3 (general; minimum service expectations for all faculty are: provide timely communication about service assignments; complete service assignments in compliance with deadlines; attend all faculty meetings, unless impossible due to professional travel or some other professional responsibility, or a major personal event; participate actively in departmental administration and governance; and; contribute generally to educational and professional outreach within and beyond UNM.); see also expectations by rank in Section B)	V.B.1.(c)	V.B.2.(c)	V.B.3.(c)	See general	See general	See general

**Appendix B: Annual Workload Expectations Review Assessment Tool**

Faculty Member: \_\_\_\_\_

Academic Year: \_\_\_\_\_

Workload Category	Brief description of workload expectations established in the current review cycle (including points per category—must total 100)	Expectations for the next review cycle (including points per category—must total 100).	Comments	If necessary, adjustments (please date, initial, create new pdf.)
Teaching (default 40 points for tenure-track faculty; 80 points lecturers)				
Research/ Scholarly Work (default 40 points for tenure-track faculty; 0 points lecturers)				
Service (default 20 points for all faculty)				

Signed:

Department Chair: \_\_\_\_\_ Date \_\_\_\_\_

Faculty Member: \_\_\_\_\_ Date \_\_\_\_\_