

The University of Texas at San Antonio
Carlos Alvarez College of Business
Faculty Workload Assignment Policy
As Approved by Faculty Vote on April
21, 2023

OVERVIEW

The Alvarez College of Business is dedicated to creating and sharing knowledge that enhances the translation of theory to practice. Our vision is to transform our students from curious and hopeful learners into confident and career-ready young professionals. The college is a community of scholars who advance the art and science of business through rigorous and relevant research that is published in outlets of distinction and translated for practice in the classroom. In order to enhance the success of our students, instructional quality is of significant importance for all modalities of delivery. Our faculty are dedicated to efforts that support our students to become young professionals and accomplish this through active and substantive service to the profession, university, college, and department.

This workload policy outlines expectations for all faculty in the college and aligns with our vision and mission to serve our students, to produce rigorous and relevant research, and to maintain an active portfolio of service to the profession and university. The college workload policy aligns with UTSA [HOP 2.14 Faculty Workload Requirement](#) which states, “*Texas Education Code 51.402 recognizes that important elements of workload include classroom teaching, basic and applied research, and professional development.*” Furthermore, this policy aligns with UT System’s Regents Rule whereas “*institutions of higher education...have the responsibility to fully utilize their faculty resources in ways that achieve the greatest possible educational benefit*” ([Regents Rule 31006, Section 2](#)). This workload policy also strategically aligns with the standards of our accrediting body AACSB International. On balance, the college workload policy emphasizes and aligns with the values of all three elements of workload: teaching, research, and service.

Integration with Faculty Annual Performance Evaluation Rubric

This faculty workload policy intends to fully integrate faculty workload assignments with the college’s faculty annual performance evaluation rubric. The college *Faculty Annual Appraisal Rubric* (hereafter ‘Rubric’) will be used to evaluate faculty performance and determine whether or not faculty ‘meets standards’ for teaching, research, and service expectations. The Rubric is a continuous improvement tool providing expectations for faculty to contribute to all levels of operations within the university, college, and profession.

The Alvarez College of Business Faculty Annual Evaluation process is linked to the mission and goals of the college. Key elements of the system are that it:

- a) Ensures some commonality in evaluations across departments;
- b) Ensures transparency and objectivity in the annual appraisal process;
- c) Provides individual faculty with a reasonable idea of their annual performance;
- d) Links appraisals to what is needed to meet the mission/goals/vision of the college
<https://business.utsa.edu/about-us/>;
- e) Quantitatively rewards faculty for “going the extra mile” in teaching, research, service;
- f) Allows each faculty member to participate directly in the process through an initial self-assessment, including personal statements, before the departmental faculty review committee and department chair perform their professional assessments; and
- g) Provides for explicit, multiple layers of review in the appraisal process.

The college has a Rubric Review Committee consisting of faculty representation from each department. The charge of this committee is to suggest updates to the Rubric to ensure it aligns with the mission and goals of the college.

I. WORKLOAD ASSIGNMENTS:

All faculty in the Alvarez College of Business are required to have a workload assignment for the two long semesters of the 9-month academic year. The workload assignment will fall into one of three categories, expressed in the *number of courses* taught during the 9-month academic year:

- Teaching Intensive (4-4)
- Balanced (3-3)
- Research Intensive (2-2)

The workload is also expressed as a percentage of time and effort dedicated to teaching, research, and service (T-R-S), which is used in the annual review process. The college adopts standard T-R-S weights of 40%-40%-20% for Research Intensive faculty. This benchmark is modified to enhance our academic career progression system and provide a portfolio of academic tracks that aim to produce maximum educational benefit to our students and meet college goals. See the Workload Tracks below for details.

Generally, the workload percentage for teaching will correspond to the number of course sections taught in a year, with each course section accounting for 10%. Therefore, a faculty member on a 2-2 course load would have a teaching percentage of 40%, a faculty member with a teaching load of 4-4 would have a teaching percentage of 80%, and so forth.

In instances where the teaching load is adjusted, the percentage adjustment should be distributed where the time/effort is intended to be allocated. For example, untenured faculty will typically be assigned a 1-2/2-1 teaching load, with the percentage associated with the one-course reduction (10%) reallocated to research.

Similarly, service percentages may be adjusted upward or downward depending on expected contributions to service, with the percentage adjustment reallocated to another activity. For example, untenured faculty are typically expected to have a lower service expectation, so the typical 20% service percentage may be reduced to 10%, with 10% reallocated to research. Combined with the example from the previous paragraph, this would result in T-R-S weights of 30%-60%-10% for an untenured faculty member.

Course Releases

Course releases are approved at the discretion of the Dean of the Alvarez College of Business, to support college goals. These college-level goals include meeting student and degree program needs, supporting the college's business and accounting accreditation efforts, achieving research outcomes on par with Carnegie R1 institutions, pedagogical innovations, alignment with university strategic initiatives for student success, or other strategic initiatives.

Adjustments for Administrative Assignments

An administrative appointment is an assignment given to a faculty member at the department, college, or university level. T-R-S weights are adjusted based on the administrative assignment weight agreed upon between the Dean and the faculty member (see Table 4 for guidelines). The Dean also maintains discretion and authority to provide course releases related to administrative assignments.

Determination of Faculty Workload Assignments

Faculty are assigned to workload assignments based on several strategic efforts, including faculty performance outcomes in research, teaching, and service. Other factors include:

- Student needs related to departmental and Alvarez College of Business degree programs
- The goals of the department and the Alvarez College of Business
- Department and Alvarez College of Business budgetary resources

In alignment with UTSA HOP 2.14, faculty workload assignments are subject to the approval of the Dean of the Alvarez College of Business. The past performance or potential for faculty members to make significant impact across areas of teaching, research, and service constitute the basis for faculty workload assignments. These assignments must be submitted in writing, signed, and approved at appropriate levels. The Department Chair and the Dean of the Alvarez College of Business conduct reviews of workload assignments annually. The Dean or delegate shall assign workload in instances where there is a failure to submit a signed faculty workload agreement.

Consistent with AACSB Accreditation reviews, workload assignments will be re-evaluated based on the faculty member's evaluation performance for the previous five years. The department chair, with the approval of the Dean, may change a faculty members' workload assignment if:

1. The individual is not meeting their workload assignment milestones within the five-year period or
2. The individual is meeting workload assignment milestones for a different track and requests to be reassigned or
3. The changes in an individual's workload assignment are deemed essential to meet college goals or resource constraints.

Department chairs are required to communicate, in writing, any approved changes to workload assignments to the impacted faculty member at least during the Spring semester prior to the Fall assignments.

Table 1a. Workload Tracks and Teaching, Research and Service

Table 1a summarizes the standard teaching, research, and service workload efforts assigned annually as a part of annual evaluation. All workload tracks and/or modifications of existing workload tracks will require approval of the Department Chair and the Dean. Other workload options may be negotiated with Department Chair and Dean as necessary, including administrative assignments. To meet the needs of the college, the following workload assignment tracks are available, expressed in the *number of courses taught* in the two long semesters of the 9- month academic year. The corresponding weights for teaching, research, and service (T-R-S) are as follows:

WL Track	Typical T/R/S/ Effort	Minimum - Maximum Annual Courses Taught (From Table 1b)	Notes
Teaching			
Track A* Track B*	80% - 10% - 10%	6-8**	The expectation is eight (8) courses taught per year (see Table 1b). Number of courses taught may be adjusted to a minimum of six (6) for workload equivalencies from Table 1c. Track B is available to part-time faculty only. Part-time faculty who wish to seek a title promotion should be assigned Track A and see Table 2a Teaching Intensive Track A requirements.
Balanced			
Track A Track B Track C	60% - 20% - 20%	4-6**	The expectation is six (6) courses taught per year (see Table 1b). Number of courses taught may be adjusted to a minimum of four (4) for workload equivalencies from Table 1c.
Research			
Track A Track B/ Untenured	40% - 40% - 20% 30% - 60% - 10%	2-4**	The expectation is four (4) courses taught per year (see Table 1b). Number of courses taught may be adjusted to a minimum of two (2) for workload equivalencies from Table 1c. Untenured faculty are

			typically assigned to Research Track B for first 3 years.
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* Research includes professional engagement activities.

** Exceptions to the minimum must be approved by the Dean. Exceptions might include, for example, grant buyouts.

Faculty workload assignment tracks are for the 9-month academic year (two long semesters). The standard workload for tenured faculty is the **Balanced Teaching workload, Track A**. The standard workload for untenured faculty members during their probationary period is the **Research Intensive, Track B**. Workload descriptions are below. Faculty remain on their respective workload track so long as the faculty meets research productivity outcomes, teaching and service performance outcomes as outlined in Table 2a. With approval of the Department Chair and Dean of the college, variations to the established 2-2 course allocation may be made to address departmental and/or college needs.

Workload Descriptions

Untenured tenure-track faculty are assigned to the Research-Intensive Track B during their probationary period, which is typically first three years, and will normally teach courses on a 2-1 basis during the year. This reduced load is the Dean's discretion to provide releases to meet college goals.

Tenured faculty members may be assigned to one of the following workload tracks:

Research Intensive Track A – faculty members will normally teach courses on a 2-2 basis during the year.
Balanced Track A and B and C - faculty members will normally teach courses on a 3-3 basis during the year.

Teaching Intensive Track A - faculty members will normally teach courses on a 4-4 basis during the year.

Full-time faculty (fixed-term track) are assigned to the following workload track:

Teaching Intensive Track A - faculty members will normally teach courses on a 4-4 basis during the year.

Part-time faculty (adjunct faculty) will be assigned to the **Teaching Intensive Track B**. This track is available so long as the faculty meets professional engagement outcomes as outlined in Table 2a. Part-time faculty members who wish to seek a title promotion at some point in their career at UTSA should be assigned to the Teaching Intensive Track A to meet the requirements for promotion.

INSTRUCTIONAL/TEACHING ACTIVITIES

Table 1b is used to support departmental administrators and individual faculty in accounting for instructional activities for direct, online, and other delivery methods of instruction.

Table 1b: Course Teaching Credits

Course types listed below are based on planned course enrollment and design. Cross-listed courses are counted as a single course. Courses not meeting the minimum enrollment do not receive course teaching credit. All modifications to course types, minimum enrollments and course teaching credits are subject to approval by the Chair and Dean. A full course is defined as a total of 3 Credit Hours of lecture (or seminar) instruction from Table 1b.

Course Type	Minimum Enrollment	Course Teaching Credit Per Semester
Lecture 1 Credit Hour	15 UG or 7 Graduate	.33
Lecture 2 Credit Hours	15 UG or 7 Graduate	.67
Lecture 3 Credit Hours	15 UG or 7 Graduate	1.00

Table 1c: Additional Teaching and Teaching Service Credits

Faculty duties often entail larger classes as well as engaging in teaching service activities outside of the classroom to include experiential learning. The latter may include mentoring PhD students. Table 1c emphasizes teaching service activities that the College *wishes to emphasize* and recognize in support of pedagogical goals and objectives, and these elements will count toward the Annual Courses taught in Table 1a. The standard department threshold for all departments in the college is 250 students at the undergraduate level and 60 students at the graduate level. All modifications to enrollments and course teaching credits are subject to approval by the Chair and Dean. Adjustment to the stated teaching load due to large enrollments does not alter the workload percentage allocated to teaching.

Teaching and Teaching Service	Course Teaching Credit Per Semester	Notes
Over 250 Undergraduate	2.0	After Census Date
Over 60 Graduate	1.5	After Census Date

The expectation is faculty will meet workload requirements by teaching organized lectures and seminars. Where the requirement is not met by teaching organized lectures and seminars, with approval of the Dean the workload may be met by engagement in other teaching service activities. These include chairing dissertations and/or masters and undergraduate honors theses, serving as internship coordinator, supervising undergraduate research, co-teaching cross-listed sections of transdisciplinary courses or serving as course coordinator of multi-instructor/multi-section courses.

II. RESEARCH, SCHOLARSHIP and CREATIVE ACTIVITY

Additionally, meeting minimum annual performance standards are not directly commensurate with tenure and promotion standards. Faculty should refer to the college and university tenure and promotion policies and guidelines for a more detailed discussion of those expectations.

Table 2a Workload Tracks and Research, Scholarship and Creative Activity

Table 2a provides guidance for documentation of minimum scholarly/research or creative activities by workload track. Consistent with AACSB standards, research is evaluated over a five (5) year period. Meeting minimum annual workload standards are not directly commensurate with tenure and promotion standards. Faculty should refer to the college and university tenure and promotion policies and guidelines for a more detailed discussion of those expectations.

WL Track	Typical T/R/S/ Effort	Notes
Teaching		
Track A Track B	80% - 10% - 10%	(a) Track A - at least two (2) professional or academic engagement activities, (b) Track B - sustained professional work experience or professional engagement activities; Track B is available to part time faculty only.
Balanced		
Track A Track B Track C	60% - 20% - 20%	(a) Two Peer Reviewed Journal Articles (PRJs) or (b) an authored scholarly book that is determined to be of good quality* <i>plus</i> At least one additional academic or professional engagement activity
Research		
Track A Track B /Untenured	40% - 40% - 20% 30% - 60% - 10%	(a) One Academic Journal Guide (AJG or college approved equivalents) Rank 4 (or elite) publication; <i>plus</i> at least one other AJG Ranked or college approved equivalents publication; <i>plus</i> at least two additional validations of academic or professional engagement activities or b) Two AJG or college approved equivalents Rank 3 publications <i>plus</i> at least two additional validations of academic or professional engagement activities or c) One AJG or college approved equivalents Rank 3 publication plus two AJG Rank 2 or college approved equivalents or higher publications <i>plus</i> at least two additional validations of academic or professional engagement activities or d) an authored discipline-based (academic) scholarly book that is determined to be of exceptional quality* and at least two publications AJG or college approved equivalents Rank 2 or higher <i>plus</i> at least two additional validations of academic or professional engagement activities

* Subject to review and approval by Department Chair and Associate Dean of Faculty.

Note: The most recent Academic Journal Guide (AJG), published by the Chartered Association of Business Schools, is available on the COB Intranet (<http://interim.business.utsa.edu/intranet/index.htm>)

Academic Engagement Activities (All Workload Tracks)

To ensure all faculty sustain relevant currency and relevance through various intellectual activities, the college expects a variety of research-related activities. Academic engagement includes intellectual contributions and other activities:

- Publications in peer-reviewed journal articles
- Competitive research grant awards
- Service on editorial boards or committees, service as reviewers for academic journals

- Research monographs
- Presentations academic meetings
- Textbooks
- Policy documents
- Scholarly books
- Case studies
- Teaching materials
- Invited presentations/keynotes
- Leadership positions, participation in recognized academic societies and associations, research awards, academic fellow status, invited presentations.

Professional Engagement Activities (All Workload Tracks)

Professional engagement includes:

- Relevant, active editorships with business journals or other business publications
- Service on editorial boards or committees, including serving as reviewers for professional journals
- Significant participation in business professional associations, professional standard-setting or policymaking bodies
- Consulting activities that are material in terms of time and substance
- Faculty internships
- Development and presentation of executive education programs
- Relevant, active service on boards of directors
- Documented continuing professional education experiences
- Participation in professional events that focus on the practice of business, management, and related issues
- Participation in other activities that place faculty in direct engagement with business or other organizational leaders
- Newspaper articles
- Consulting project reports.

Funded Research Outcome Equivalency

The quality assessment of the research grant or patent must be documented using the evaluation criteria below and is subject to approval by the Department Chair and the Dean. The Evaluation of External Grants will be based on numerous factors, including, but not limited to the following:

- Source of Grant – Federal, State, or Local
- Cumulative Grant Amount Awarded.

Table 2b Grants Awarded and Publications

Grant activity is an important part of the mission of the Alvarez College of Business. Grants and publication equivalencies are provided in the Table 2b.

Grant Source	Cumulative Grant Amount	Publication Equivalency
Federal/State/Industry	\$ 0 up to 100,000	AJG Level 1
	Over 100,000 up to 200,000	AJG Level 2
	Over 200,000 up to 500,000	AJG Level 3
	Over 500,00 up to 750,000	AJG Level 4
	Over 750,000	Elite Journal

III. SERVICE ACTIVITY

Faculty engagement in service activities is essential to achieve the goals and mission of the Alvarez College of Business and the University. As the normal course of being a faculty member in a department, faculty will engage in many types of service activities. Faculty service activities can take many formal and informal forms to support the department, college, university, profession, and larger community. The minimal or baseline service in this policy is focused on formal activities to include internal committee service as well as external service to the profession.

Table 3a Workload Tracks and Service Expectation

Table 3a provides an overview of the service expectations by workload track. Department chairs will work with faculty in the development of service expectations. Meeting minimal service expectations for workload is not equivalent to meeting expectations for merit, tenure, or promotion. Those expectations are outlined in separate policies. The amount and distribution of service efforts will depend on faculty rank and workload track as well as the need to achieve the mission and goals of the department, college, and university. Service expectations by workload track are shown in Table 3a. Annual Workload Agreements should reflect the distribution of service effort for the chosen workload track.

WL Track	Typical T/R/S/ Effort	Notes
Teaching		
Track A Track B	80% - 10% - 10%	No service is expected of Track B faculty who are part-time.
Balanced		
Track A Track B Track C	60% - 20% - 20%	Track B is the most service intensive track.
Research		
Track A Track B/Untenured	40% - 40% - 20% 30% - 60% - 10%	Service expectations for untenured faculty in Track B are less than for tenured faculty.

Table 3b Baseline Service Activity

Table 3b provides guidance for baseline service. The baseline is serving as a member of a department level committee (X). Table 3b provides guidance to the relative weights for different service activities by faculty in the Alvarez College of Business. Not all committee assignments are equal; chairing DFRAC when there are no cases is not equivalent to serving as chair of an active faculty search committee or serving as a member of a graduate or doctoral admissions committee. Department chairs and faculty should be cognizant of this when developing the faculty member's Annual Workload Agreement.

3b1. Department and College Service
Committee Member (X)
Committee Chair (2X)
Officer COB Faculty Forum (3X)
Commencement Participation (X)
Faculty Mentor (X)
Course Coordinator of Multi-Section Courses (X)
Student Organization Faculty Advisor (X)
Accreditation/Assurance of Learning Coordination (2X)
3b2. University Service
Committee Member (X)
Committee Chair (2X)
Faculty Senate, Graduate Council, Grievance Committee (2X)
Chair Faculty Senate, Graduate Council, Grievance Committee (3X)
3b3. Professional Service
Journal Editor (4X)
Journal Editorial Board (3X)
Elected Officer in Organization (2X)
Reviewer/coordinator National/International Academic Conference (X)
Journal Reviewer (X)

Board Service – Public or Private Organization (X)
Community Engagement (X)

IV. COURSE OVERLOAD

A course overload is defined as teaching organized courses (See Table 1a) that exceeds 100% effort in workload distribution in a 9-month academic year. Courses taught in the summer semester by faculty with a nine-month contract are not counted as course overload. Solely exceeding 100% workload distribution does not automatically justify overload compensation. Courses taught as an overload may not be used for credit towards future responsibilities or meritorious activity if compensation is received in addition to regular salary. Compensation may be financial, or a reduction in course load - all subject to the approval of the Department chair and Dean of the college.

V. ADMINISTRATION

An administrative appointment is an assignment given to a faculty member at the department, college, or university level. The Table below includes the roles that qualify as an administrative appointment, the percent effort of these appointments, the number of months for the annual supplement and the number of months of summer support. When an administrative appointment is granted, the percentage allocated to administration will be reallocated from teaching, research, or service based on agreement between the faculty member, Department Chair, and Dean. In other words, the administrative assignment does not push the total workload above 100%, it instead reallocates time from teaching, research, or service to the administrative role. The Alvarez College of Business shall determine the rate of the annual supplement based on the number of degree programs, student enrollment, number of faculty, etc. Table 4 presents guidelines for administrative appointments.

Table 4 Administrative Appointment Guidelines

Role	% Effort	Annual Supplement	Summer Support
Department Chair	50	12 months	1.5 months
Asst. Dept. Chair	20	12 months	0.5 months
Associate Dean	60	12 months	1.5 months
Asst. Dean	30	12 months	1.0 months
University Transdisciplinary Center/Institute Director	20	To be determined in coordination with the University Research Office	To be determined in coordination with the University Research Office
College Center Director	20	None	None

The College maintains a portfolio of master's programs where faculty can serve as graduate advisors of record (GAR) or academic program director. Appointments to the position of academic program director or GAR, as well as the distribution of Teaching, Research, and Service, are recommended by the Department Chair and approved by the Dean of the College. The Alvarez College of Business shall determine the compensation structure for masters' graduate advisors of record and academic program directors based on the number of degree programs and student enrollment. Course releases for administrative duties of these roles are approved by the Dean.

VI. COURSE AND RESEARCH BUYOUT

There is an expectation that faculty apply funds from extramural grants to cover summer salary, and should the faculty have sufficient remaining funds, to buyout courses and/or research time. The course or research time buyout rate calculation is based on the faculty member's individual workload weights. For example, for faculty in a standard research workload, this weight is set at 40% teaching, 40% research, and 20% service. The PI must inform and coordinate with the department chair the desire to request a course buyout before the request is made. No course buyout request will be approved without department chair's consent. For further details see the *College of Business Faculty Course and Research Buyout Policy and Procedures* http://interim.business.utsa.edu/intranet/pdf/Workload/COB_Policy_Procedures_FY23_March%2023%2

VII. SUMMER COMPENSATION

Per [HOP 2.23 Faculty Compensation for Additional Duties and Salary Adjustments](#), “*teaching-related summer salary compensation is usually tied to Summer School Teaching and special programs – rates for compensation are determined by the colleges.*” Based on budgetary resources, the college will determine its summer compensation each year consistent with College teaching needs and the budget model. [HOP 2.05 Faculty Appointments, Salaries, Payment Plans, Distribution of Checks](#) provides the policy for summer pay. HOP 2.05 (II) states “*A faculty member is compensated for summer session teaching at a rate based on his or her nine-month academic rate for the period immediately preceding the summer session. No rate increases are permitted during the summer. The base salary rate of a faculty member during the summer cannot exceed the base salary rate paid for the same or similar services during the preceding long session; therefore, no faculty member can receive remuneration over the three-month summer period in excess of one-third of his or her previous long-term academic rate.*”

Availability of summer teaching for all faculty members is dependent upon student need and available budget. The College summer pay scale is determined based on budgetary resources and department needs. The pay rates will be determined prior to the development of summer schedules.