

REPORT FROM THE JOINT TASKFORCE ON FACULTY WORKLOAD & APPOINTMENTS

NOVEMBER 2023



EXECUTIVE SUMMARY.

This report contains the analysis, findings, and recommendations of the Faculty Workload and Appointments Taskforce (the “Taskforce”), a joint committee struck under a Memorandum of Understanding (“MOU”) signed at the conclusion of collective bargaining in March 2022.

Creating the Taskforce allowed the parties to engage in meaningful and important dialogue about a broad range of identified issues, separate from the normal process of collective bargaining. Since the Taskforce did not have a mandate to amend the Collective Agreement, the Taskforce could not engage in bargaining. Indeed, as the MOU identified, the work of the Taskforce was not to resolve the issues, but rather to explore them fully ahead of the next round of contract negotiations so that parties need not rehearse arguments or engage in unnecessary delays. That said, this report does contain some consensus-based recommendations for consideration in the next round of bargaining (see Appendix M - Summary of Recommendations).

The Taskforce was struck in May 2022, with three members and one alternate appointed by each of the Board and the Association.

Taskforce Membership

Association Representatives	Board Representatives
Brenda Lang, Fixed-Term Instructor General Management & Human Resources	Evan Cortens Dean of Continuing Education & Extension (formerly Director, Institutional Research & Planning)
Gülberk Koç Maclean, Senior Lecturer Department of Humanities	Jennifer Pettit Dean of Arts
Lee Easton, Professor Department of English, Languages & Cultures	Jonathan Withey Dean of Science & Technology
Patricia Kostouros, Professor and Chair Child Studies & Social Work	Kelly Williams-Whitt, Dean of Business & Communication Studies

It was agreed that the alternates would be full members of the Taskforce.

The MOU also called for a facilitated discussion of the issues to be examined. Therefore, the Taskforce called for and received proposals to undertake this role. Mr. Lyle Kanee, QC, was selected as the Taskforce’s Facilitator, based on his extensive experience in labour and employment relations in the Alberta public sector and his work with the parties during the most recent round of collective bargaining. Mr. Kanee was familiar with the genesis of the Taskforce and the underlying issues that prompted its creation, and so seemed well-positioned to provide a clear and coherent vision for the role of Facilitator.

Two Important Contexts of Faculty Workload.

1. The Taskforce explored how faculty work can be undertaken, assigned, and recognized in long-standing patterns where inequity manifests. Faculty from historically-excluded/equity-denied groups are also often disproportionately called upon to undertake work related to equity, diversity, and inclusion initiatives. They also sometimes/often mentor other faculty and students, and/or engage in local and institutional Indigenization efforts. These activities are vital to the functioning of Mount Royal University (the “University”), yet they can be invisible and remain unacknowledged in formal systems. The Taskforce found addressing these issues more specifically to be a challenge, given the lack of institutional demographic data that might help shape a clearer understanding.

The Taskforce strongly recommends that the University collect key demographic data from its employees so that action can be taken on this issue.

2. The Taskforce also discussed how collective bargaining occurs in a variety of contexts, both internal and external to the University. The provincial landscape for collective bargaining has, in recent years, shifted significantly through provincial legislation including *An Act to Enhance Post-secondary Academic Bargaining* and in 2019, the introduction of a new statute, the [Public Sector Employers Act](#) (PSEA), which provides the President of Treasury Board and the Minister of Finance with the legislative authority to issue directives that set strategic direction in public sector bargaining, including term and fiscal limits. PSEA also provides the means to ensure that government direction is met prior to agreement being reached.

Both parties have experience in this landscape but hold different perspectives on its impact on bargaining at the University.

- The University holds that any insight the Taskforce’s report provides into issues of faculty workload or pathways, including any further evolution, must be understood in the context of PSEA and the serious restraint that mandates impose.
- The Association strongly objects to the Province’s use of bargaining mandates. The Association observes how these mandates add an invisible third party to the negotiations, effectively restrict the scope of bargaining with the University, and create obstacles to concluding negotiations in an interest-focused manner.

However, the Taskforce learned during the facilitated discussions on this topic that deviations from a bargaining mandate, however modest, must be based on differentiation from similar workplaces within the sector. In most cases, the Facilitator noted that parties must make a unique argument or set of arguments to the Provincial Bargaining and Compensation Office (“PBCO”) in order to provide a compelling and convincing case for deviations from the mandates set by the provincial government.

Full-Time Faculty Workload.

The MOU directed the Taskforce to examine the broad parameters guiding full-time faculty workload, in relation to the way they are currently articulated in the Collective Agreement. Through its work with Facilitator Kanee, the Taskforce

brainstormed a range of possible solutions to faculty workload (See Appendix D). Four key observations emerged through this process.

Four Key Observations

1. With respect to workload assignment, there was consensus that no changes are needed to Article 14.1.
2. With respect to workload distribution, no consensus was found to fully leverage the Department Average and/or the instructional workload ranges in the Collective Agreement to distribute workload across employees by rebalancing responsibilities.
3. With respect to workload volume, there was consensus that workload should be equitable across employees, and that reductions in workload (if any) must also be equitable. However, there was no consensus on the meaning of equity within the context of instructional workload allocation. The meaning of equity is particularly relevant as it relates to workload volume.
4. In the course of the Taskforce's work, no consensus was found on whether faculty workload is a generalizable issue (i.e., one affecting all full-time faculty) or a non-generalizable issue (i.e., a problem of specific groups/individuals of faculty).

Please refer to the section *General Considerations Related to Full-time Faculty Workload* in the full report for a comprehensive account of both parties' perspectives on this issue.

Despite quickly identifying a fundamental difference in perceptions of the nature of the concerns (generalizable versus non-generalizable), the parties identified several areas of mutual interest/consensus as shown below.

Areas of Consensus: Full-time Faculty Workload

Maintain SICH as the measurement of instructional workload.

Amend the definition of SICH in the Collective Agreement to outline the components of SICH more clearly (including, among other factors, class preparation, student assessment, and student contact).

Avoid complex workload formulas for the determination and calculation of full-time faculty workload.

Keep the TS and TSS work patterns.

Examine expectations related to service commitments to ensure better balance.

Improve the culture of meetings at the University to ensure time is well used.

Examine workload considerations for faculty early in the tenurable period.

Communicate clearly and proactively existing options in the Collective Agreement that intersect workload volume and workload distribution/flexibility.

Examine the resources for core academic supports with a view to increasing their efficacy.

See the full report for the details about these areas.

Specific Stakeholder Groups and Pathways.

The MOU directed the Taskforce to examine the categories of Senior Lecturer and the tenurable TS role, including how these roles are currently differentiated. The Taskforce also decided to examine the categories of Full-time Laboratory Instructor, Counsellor, Academic Developer, and Librarian. The Taskforce engaged in consultation sessions with groups of individuals appointed to each of these categories.

A. Senior Lecturers and Permanent Laboratory Instructors.

Based on the discussion in the Taskforce and on the consultations held with faculty who hold appointments either as Senior Lecturer or permanent Laboratory Instructor, listed below are the areas of common interest/consensus between the parties.

Areas of Consensus: Senior Lecturers and Laboratory Instructors

Clarify service opportunities available to Senior Lecturers, as well as the accompanying service expectations, in the Collective Agreement.

Clarify service expectations of the Senior Lecturer role with Department Chairs and/or through updates to University-level resources (e.g., a handbook).

Review the definition of Laboratory Instructor L1/L2 to ensure it reflects the employees' status as full-time faculty members.

Undertake an inventory of Laboratory Instructors' current responsibilities and make this information available to the bargaining teams.

B. Counsellors, Educational Developers, and Librarians.

There was no consensus around the workload of faculty appointed to these positions. However, the report does provide an overview of what the Taskforce heard. We noted the following commonalities in workload among these categories of appointment.

- Each group indicated that the content and complexity of their work has changed over time.
- Workload is fluid; requests can be made at any time of the year, or due to emerging institutional needs.
- There are divisions about when workload should be assigned. Some believe it should be assigned by mid-February of the preceding academic year in question. This theme was particularly germane to the workload of Educational Developers and Librarians

C. Faculty Appointments and Pathways.

The Taskforce examined the categories of Senior Lecturer and the tenurable TS role, including how these roles are differentiated and the pathway to each. Specific issues, interests, and options related to the workload of Senior Lecturers are primarily captured above. The following areas of consensus were identified:

The role of Senior Lecturer should be retained.

The “internal first” eligibility window for Senior Lecturer positions should be extended.

The parties were unable to reach consensus on any recommendations that would allow Senior Lecturers to move into the TS role or to pathways from the Senior Lecturer to the TS role, beyond those which currently exist in the Collective Agreement.

The Association had a clear interest in Senior Lecturers benefitting from creating a clearly defined pathway to tenurable positions. The Association believes such pathways are important and appropriate based on the qualifications and commitment of many of the current Senior Lecturer incumbents, the evolution of thinking and experience associated with the Senior Lecturer role since its inception, and the lack of existing career advancement opportunities for permanent faculty members.

The Board expressed no interest in Senior Lecturers having a clear pathway to tenurable positions. Among the reasons for this was the view that the Senior Lecturer position was created to provide greater stability and predictability of employment for contract faculty and not as a stepping stone to tenurable positions. The Board also emphasized the importance of open competition for all tenurable appointments and the desire to maintain the integrity of the tenure system. The Board voiced concerns that a more clearly defined pathway may disincentivize creation of Senior Lecturer positions given the cost differential between Senior Lecturer and TS/TSS faculty appointments and the budget implication of those costs.

In the absence of consensus on a more clearly defined pathway to tenure, the Taskforce reviewed options that might serve to make Senior Lecturers more competitive for other positions. These options included:

- Improving professional and career development opportunities for those who wish to realize success in applying for a tenurable position.
- Potential access to professional/sabbatical leaves.
- Support for preparing an application for a tenurable position.

The Taskforce was unable to reach consensus on these topics.

Conclusion and Next Steps.

Using an interest-focused approach to explore issues and to identify options to resolve them, the Taskforce identified some important areas of consensus and, where possible, made recommendations (see Appendix M for a full list). Having found these areas of consensus should support a more focused approach to bargaining.

That said, there are areas where clear differences remain, including whether faculty workload volume is a general problem for all full-time faculty or a problem that affects some faculty, the eligibility of permanent faculty for professional leaves/sabbaticals, and the creation of clear pathways for Senior Lecturers to tenurable positions. In these areas, the Taskforce believes that laying out the different perspectives related to these issues should assist collective bargaining as the parties explore possible solutions.



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INTRODUCTION.

By its very nature, collective bargaining features varied topics and interests, is subject to both internal and external influences and contexts, and is an inherently dynamic process. Some of the interests, including their underlying issues and potential solutions, prove too substantial for the ever-evolving dynamic at the bargaining table, which can include simply running out of time to fully contemplate a particular interest.

In acknowledging that faculty workload has been a priority in previous rounds of collective bargaining and that it will remain a priority for the next round of collective bargaining, the July 1, 2020 - June 30, 2024 Collective Agreement included the MOU *Regarding a Taskforce to Review Full-time Faculty Workload and Appointment categories,*” which resulted in the Taskforce’s creation. As this MOU notes, during the last round of bargaining the parties discussed a broad range of issues related to full-time faculty workload which included:

- Workload volume.
- Workload distribution across areas of faculty responsibility (i.e. teaching, service, and scholarship).
- Workload distribution across employees.
- Workload measures.
- Support for research and scholarship.
- The appointment categories of Senior Lecturer and the tenurable TS role.

Purpose of the Taskforce and this Report.

Creating the Taskforce allowed the parties to engage in meaningful and important dialogue about a broad range of identified issues, separate from the normal process of collective bargaining. Indeed, the Taskforce was not to engage in bargaining since the Taskforce did not have a mandate to amend the Collective Agreement. As the MOU identified, the work of the Taskforce was not to resolve the issues, but rather to explore them fully ahead of the next round of contract negotiations so that parties need not rehearse arguments or engage in unnecessary delays.

The Taskforce mandate, therefore, focused on exploring the issues, creating this report and, possibly, making recommendations (including recommendation for potential changes to the Collective Agreement). While this report does contain some consensus-based recommendations for consideration in the next round of bargaining, its primary purpose is to inform and assist bargaining by documenting, comprehensively, a full exploration of the issues using an interest-focused approach.

The MOU required that the work of the Taskforce consider the broad parameters guiding full-time faculty workload, in relation to the way they are currently articulated in the Collective Agreement. Aspects to be examined that have potential to affect faculty workload included, but were not limited to:

- The way workload is determined and assigned (consultation between the Chair and the Employees in the Academic Unit, following consultation with the Dean).
- The way workload is measured (assigned SICH, registrants, the Department Average).
- The way workload can be modified (reassigned time, workload averaging, exceptions approved by the Employee and the Dean, modification to the Department Average, workload appeal).

With respect to the categories of Senior Lecturer and the tenurable TS role, the work of the Taskforce focused on how these roles are currently differentiated and the pathway to each role.

Intended Audience.

The primary audiences for this report reflect the origins of the Taskforce and its related work. As a joint Taskforce (i.e., Faculty Association and Board), created by virtue of an MOU in the Collective Agreement, this report is intended to inform the next round of collective bargaining. Other audiences include full-time and contract faculty, as well as Deans, Vice-Deans, and other managers.

The Taskforce recognizes that the bargaining teams may individually or jointly disagree with various aspects of this report. The discussions within the Taskforce, and this resulting report, are strictly without prejudice to collective bargaining negotiations.

The content of this report pertains to the work of faculty; principally, all those whose workload is defined in Article 6 or Article 14 of the Collective Agreement (with implications for contract faculty, regarding discussions of pathways to full-time roles). These represent essential stakeholders, since the report concerns their terms and conditions of employment. The report also analyzes the categories of Senior Lecturer and Tenurable TS role, how these roles are currently differentiated and the pathway to each role.

In this regard, the report is intended to provide a full account of the work of the Taskforce, including careful consideration of the issues and their related complexity, the varied interests of the Faculty Association and the Board, and relevant factors external to the University.

Whilst the report documents a full exploration of the issues that constituted the mandate of the Taskforce, its content is expected to stimulate further discussion and debate about the underlying issues, the varying perspectives, and the efficacy of any proposed recommendations.

Finally, this report may have applicability to audiences and stakeholders external to the University. This could include the parties to collective agreements at other post-secondary institutions within the province. It could also serve to provide context beyond the content of the Collective Agreement for the Provincial Bargaining and Compensation Office (“PBCO”), which is the central agency that coordinates collective bargaining with the broader public sector employers in Alberta (see below for additional context).

Taskforce Terms of Reference.

The composition, mandate, and resource support of the Taskforce is as outlined in the MOU *Regarding a Taskforce to Review Full-Time Faculty Workload and Appointment Categories* (Appendix A), which constitutes part of the July 1, 2020 - June 30, 2024 Collective Agreement. The charge of this MOU states the Taskforce “will create a report which may provide recommendations, including potential changes to the Collective Agreement to be considered in the next round of bargaining, on ways to address the matters identified in this Memorandum of Understanding. The report shall be submitted to the Provost and Vice-President Academic, and the President of the Association, no later than January 15, 2024.”

To ensure clarity and effectiveness in the work of the Taskforce, members worked with the Facilitator to produce a set of Community Agreements (see Appendix B), which clarified:

- The relationship between Taskforce discussions and Collective Agreement negotiations.
- Articulated the role of the Facilitator (see below).
- Provided guidance on communications and effective meeting conduct.

The membership of the Taskforce, as outlined in the MOU, is six members, three appointed by the Association and three appointed by the Board. The Association and the Board each named one alternate to the Taskforce.

Taskforce Membership

Association Representatives	Board Representatives
Brenda Lang, Fixed-Term Instructor General Management & Human Resources	Evan Cortens Dean of Continuing Education & Extension (formerly Director, Institutional Research & Planning)
Gülberk Koç Maclean, Senior Lecturer Department of Humanities	Jennifer Pettit Dean of Arts
Lee Easton, Professor Department of English, Languages & Cultures	Jonathan Withey Dean of Science & Technology
Patricia Kostouros, Professor and Chair Child Studies & Social Work	Kelly Williams-Whitt, Dean of Business & Communication Studies

Patricia Kostouros and Kelly Williams-Whitt were the designated alternates of the Taskforce. However, it was determined from the outset that robust participation by all would ensure effectiveness in the work of the Taskforce; operationally and practically, all eight individuals were considered regular members of the Taskforce and participated fully in its work.

To facilitate organizational aspects, including engagement with the Facilitator outside of Taskforce meetings and the setting of agendas, Lee Easton and Jonathan Withey were designated Co-Chairs of the Taskforce.

Taskforce's Guiding Principles.

Before undertaking its work in earnest, the Taskforce also generated a list of guiding principles, intended to provide a frame of reference and touchpoint throughout the process, and with a particular focus on shaping any recommendations deriving from the work of the Taskforce. These overarching principles stated that the recommendations of the Taskforce should:

- Support pedagogically sound strategies and promote an exceptional undergraduate educational experience for students.
- Be fair in process and result.
- Be equitable and inclusive.
- Be feasible, practical, and sustainable, including financially so.

- Promote the health and well-being of employees.
 - Create processes that are collegial and transparent.
 - Create processes that are clear and provide stability and predictability.
 - Be flexible when warranted to achieve stated goals.
 - Inspire all faculty to achieve their highest quality of work and to feel their contributions are acknowledged and respected.
 - Recognize differences among disciplines and professions.
 - Respect the professional self-determination and regulation of faculty.
-

Role of the Facilitator.

The MOU required that the work of the Taskforce be supported by a Facilitator, selected by mutual agreement of the members of the Taskforce. Prior to soliciting expressions of interest from those willing and interested in undertaking the role of Facilitator, members of the Taskforce agreed that an individual was required who would be engaged from the outset of the process until its conclusion, and that the Facilitator would work with members of the Taskforce to:

- Develop ground rules/community agreement about how the Taskforce will operate, including defining the role of the Facilitator.
- Agree upon the specific activities of the Taskforce, including the timelines for them to be undertaken and completed.
- Check in on the progress of those activities and suggest, when necessary, ways to move toward completion.
- Facilitate a culminating conversation about faculty workload and appointments.
- Assist with the production of the final report, with recommendations (if any).

Taskforce members also agreed that the Facilitator would help the parties, as needed, to work through challenging conversations and contemplations, using an evidence-based and interest-focused approach. The Taskforce was clear that it was emphatically not seeking a person who would impose solutions, but rather who would assist the parties in finding commonalities where these exist.

Selecting a Facilitator.



Lyle Kanee, QC

The parties exchanged names of suggested facilitators, and shortlisted two individuals. Following a meeting with each, Lyle Kanee, QC was selected as the Facilitator, and he agreed to undertake the work. Mr. Kanee has extensive experience in labour and employment relations, and had worked with the parties during the most recent round of collective bargaining (by providing the bargaining training required in the Collective Agreement, supporting informal mediation, and helping the parties reach agreement after being appointed as mediator for statutory mediation). Mr. Kanee was familiar with the genesis of the Taskforce and the underlying issues that prompted its creation, and provided a clear and coherent vision for the role of Facilitator.

The work of the Taskforce and the Facilitator began September 28-29, 2022, at a two-day meeting to develop the Community Agreement and guiding principles, identify specific objectives for the Taskforce (including their timing), and begin interest-focused dialogue related to the workload of TS and TSS faculty members.

The Facilitator fulfilled his mandate very effectively through participation in several meetings of the Taskforce, clear counsel, advice, and guidance, regular check-ins, and frequent engagement with the Taskforce Co-Chairs to review work to-date, plan upcoming conversations, provide guidance on the discussion of challenging topics and, where consensus existed, bring challenging topics to a conclusion. Where consensus was not possible, the Facilitator encouraged the parties to outline the issues in a clear way to assist the bargaining teams in the next round.

Meeting Schedule.

The Taskforce had its first meetings in May 2022, appointed the Facilitator in July 2022, and engaged in significant organizational and planning activities on September 28-29, 2022. The Taskforce met frequently throughout the remainder of the 2022/23 academic year, and engaged in consultation with relevant stakeholders (Counsellors, Educational Developers, Librarians, Laboratory Instructors, and Senior Lecturers). The final meeting with Mr. Kanee was held September 18, 2023. The full meeting schedule of the Taskforce can be found in Appendix C.

Issues of Faculty Workload.

Although not engaged in collective bargaining/negotiations, the Taskforce determined at the outset that its mandate would be best discharged using an interest-focused approach. This was based on the broad commitment of the parties to such an approach (Article 21 of the Collective Agreement), and the suitability of this approach to the specific nature of the work to be undertaken.

Taking an Interest-focused Approach.

An interest-focused approach elevates the discussion, supports joint problem solving, results in clearer communication of interests, allows for the exploration of creative options, and is conducive to the development of viable resolutions. This was important because the primary objective of the Taskforce was to fully explore the issues constituting its mandate. Through doing so, the analysis and discussion below captures the scope of this exploration: summaries of the issues and interests, the spectrum of possible solutions, the nature of consensus, disagreement or differing viewpoints, and the development of recommendations. This is very much in keeping with a fundamental purpose of this report: to inform and assist bargaining by documenting, comprehensively, a full exploration of the issues using an interest-focused approach.

The Taskforce utilized this approach when considering the broad parameters guiding full-time faculty workload, and when considering the categories of Senior Lecturer and the Tenurable TS role with respect to how these roles are currently differentiated and the pathway to each role.

Following a broad discussion of the related issues and interests, the Taskforce engaged in the following process:

- Participated in a brainstorming exercise to generate potential options/solutions.
- Sorted (by theme) and discussed the generated options/solutions.
- Identified areas where there was clear consensus, no consensus, or options that warranted further exploration.

This work is summarized for both thematic areas: full-time faculty workload in Appendix D, Senior Lecturer/TS/pathways in Appendix J.

Through an iterative and incremental process, supported by the Facilitator, the analysis and discussion outlined below emerged. The report lays out a robust account of the Taskforce's work, including its careful consideration of the issues and their related complexity, and the varied interests and contextual factors that accompany them. Recommendations are also included in Appendix M.

In discussion, the Taskforce recognized that the workload of Counsellors, Educational Developers, Librarians, Laboratory Instructors, and Senior Lecturers required special consideration, due to the somewhat unique characteristics (as compared to the majority of full-time faculty, whose workload is defined according to Articles 14.4 and 14.5 of the Collective Agreement). The Taskforce (using subcommittees) therefore engaged in specific consultations with these groups, organized around the following fundamental questions:

- What is the volume of work, and how is this defined (what counts)?
- What contributes to workload volume?
- Is there a volume issue?
- How has workload volume changed overtime and what are the contributing factors?

The analysis and discussion below reflect the feedback received directly from these groups, in addition to the identification of areas where there was clear consensus or lack of consensus within the Taskforce, as well as any recommendations.

Structure of this Report.

The remainder of this report provides a detailed account of the discussions, perspectives, and recommendations of the Taskforce. It outlines the broad interest-focused approach to fulfilling the mandate of the Taskforce, and provides analysis and discussion of the two core areas of focus: the workload of full-time faculty members, and faculty appointments and pathways. Recognizing the various categories of full-time faculty appointments, the report provides broad considerations for faculty appointed to TS and TSS work patterns, whose workload is assigned per Articles 14.4 and 14.5, as well as specific considerations for Counsellors, Educational Developers, Librarians, Laboratory Instructors, and Senior Lecturers.

Contexts.

The Taskforce has worked to ensure that this report considers all full-time appointment categories, attempts to capture multiple voices and perspectives in a fair and reasonable manner, and articulates where there may be differences in understanding or definitions of specific terms (e.g. some aspects of workload equity).

Faculty Workload and Equity Concerns.

It is important that faculty workload also be viewed through the lens of equity and inclusion. With respect to equity, faculty work can be undertaken, assigned, and recognized in long-standing patterns where inequity manifests. In addition, studies have shown that faculty from Black, Indigenous, People of Colour communities and other equity-deserving groups also have additional pressures and workload as a result of racism, including anti-Black and anti-Indigenous racism.¹

At the same time, faculty from historically-excluded/equity-denied groups are also often disproportionately called upon to undertake work related to equity, diversity, and inclusion initiatives at the University, in their disciplines and professions, and in communities. They sometimes/often mentor other faculty and students, and/or engage in local and institutional Indigenization efforts. All of these activities are vital to the functioning of the University, yet they can be invisible to many and are often unacknowledged. As a result of these patterns, the workloads of some faculty can become inequitable, with a risk that the structures, cultures, and design of faculty work reproduce and normalize the inequity.

While this report comments on these aspects in broad terms, the Taskforce found addressing these issues more specifically to be a challenge, given the lack of institutional demographic data that might help shape a clearer understanding.

The Taskforce strongly recommends that the University collect key demographic data from its employees so that action can be taken on this issue.

¹Dhamoon 2020.

University Budgets, Mandates, and the Provincial Landscape.

Collective bargaining occurs in a variety of contexts, both internal and external to the University; the provincial landscape for collective bargaining has, in recent years, shifted significantly. This context is relevant to the work of the Taskforce, given its connection and intersection with the Collective Agreement and the negotiation process.

On May 4, 2017, the Government of Alberta passed Bill 7: An Act to Enhance Post-secondary Academic Bargaining. This legislation amended the Labour Relations Code and the Post-Secondary Learning Act. Some of the key changes included

- Bringing academic staff at public universities, public colleges, and technical institutes under the Labour Relations Code, thereby granting academic staff associations all the rights and remedies that are granted to unions under the Code, including the right to strike.
- Recognizing a new category of employees, being postdoctoral fellows, and creating a postdoctoral fellow association while also granting this association all the rights and remedies granted to unions under the Code.
- Granting public post-secondary institutions, the right to lock out employees.
- Requiring public post-secondary institutions to negotiate essential services agreements.
- Ending compulsory interest arbitration, but permitting parties to use voluntary arbitration when parties agree to do so ²

On October 28, 2019, the Alberta government introduced Bill 21: Ensuring Fiscal Sustainability Act, 2019. This bill resulted in several legislative changes that impacted labour and employment relations in the Province and which raised various considerations for employers. Changes included amendments to several pieces of existing legislation and the introduction of a new statute, the [Public Sector Employers Act](#) (PSEA). The legislation applies to Mount Royal University.

- PSEA provides the President of Treasury Board, Minister of Finance (“Minister”), with the legislative authority to issue directives that set strategic direction in public sector bargaining, including term and fiscal limits, and the means to ensure that government direction is met prior to agreement being reached.
- PSEA also allows the Minister to request various kinds of bargaining related information about compensation, employment, and labour market data from affected employers.

The PBCO works in accordance with PSEA, and is the central agency that coordinates collective bargaining with the broader public sector employers. The role of PBCO and the impact of PSEA on the landscape of public sector bargaining is germane to this report.

The parties have direct experience of the impact of PSEA on collective bargaining during the most recent round of negotiations that yielded the July 1, 2020 - June 30, 2024 Collective Agreement.

² For clarity: interest arbitration resolves disputes that arise in collective bargaining negotiations between the employer and the union. Grievance arbitration resolves disputes over interpretation of an existing contract provision.

Two views on the Provincial Landscape.

The parties hold different perspectives on these legislative changes.

The Board observes that provincial bargaining mandates serve as a constraint/restraint on bargaining and what is reasonably possible for the Board to bargain freely. Board mandates include fiscal constraints and limitations within which subsequent iterations of a collective agreement must be settled. The University also holds that any insight that the report of the Taskforce provides into issues of workload or pathways, including their potential for further evolution, must be understood in the context of PSEA and the serious restraint that it imposes.

The Association strongly objects to the Province's use of bargaining mandates. The Association observes how provincial mandates add an invisible third party to negotiations and interfere with free collective bargaining. In particular, the Association believes that while the PBCO may provide the Board with a mandate, such mandates do not help arriving expeditiously at an Agreement. Indeed, as the most recent round of negotiations showed, provincial directives that are "confidential and may not be disclosed by the employer to any third party without prior consent of the Minister" (often called "secret mandates") restrict the scope of bargaining and create obstacles to concluding negotiations in an interest-focused manner.

The Facilitator's View.

The Taskforce did hear from the Facilitator that, in his experience, changes outside of the bargaining mandate, however modest, must be based on differentiation from similar workplaces within the sector. Mr. Kanee noted that parties must make a unique argument or set of arguments to the PBCO in order to provide a compelling and convincing case for deviations.

Arguments for deviations are often found in comparator analysis, i.e., by looking at similar institutions within or outside the province, and seeking to make the case for why the University is an outlier. Mr. Kanee suggested that using these comparators would demand socializing with the government and the PBCO, who may not agree with the identified problems, or come to the same conclusion about what the potential solutions might be.

GENERAL CONSIDERATIONS RELATED TO FULL-TIME FACULTY WORKLOAD.

This section provides a general overview of the issues and interests related to faculty workload. While the primary focus is on faculty whose workload is assigned according to Articles 14.4 and 14.5 of the Collective Agreement, these general considerations have broad implications for the workload of all full-time faculty.

This is because the Articles concern measures of workload that are universal in the Collective Agreement (i.e., SICH) or deal with important intersections, i.e., scheduled and non-scheduled duties of Counsellors, Educational Developers, and Librarians that are determined as equivalent to the instructional component of the TS and TSS work patterns, as defined in Articles 14.4 and 14.5 of the Collective Agreement, respectively.

Introduction to the Issues and Interests.

The creation of the Taskforce acknowledged that faculty workload has been a priority in previous rounds of collective bargaining and recognizes that it will remain a priority for the next round of collective bargaining.

With respect to the round of bargaining that resulted in the July 1, 2018, to June 30, 2020 Collective Agreement, the parties agreed to the following general changes related to full-time faculty workload:

- Averaging of instructional load for tenured employees (“banking”) over a period of three consecutive academic years to enable the employee to focus on a research or scholarly activity project. This provision (Article 14.6) was intended to provide tenured employees with an opportunity to focus on projects that might not be met by existing provisions such as sabbatical leave or List A reassigned time allocations.
- Establishment of a working group to explore the determination and utility of the Department Average.
- Increase in List A from \$405,000 to \$500,000 to support reassigned time for work that faculty does in addition to their regular duties.

With respect to the round of bargaining that resulted in the July 1, 2020 to June 30, 2024 Collective Agreement, the parties agreed to the following general changes related to full-time faculty workload:

- Implement the report of the Department Average Working Group.
- Provisions allowing carry-forward of unawarded sabbaticals for one year (relative to the quota normally available in a given year).
- Creation of the Taskforce to facilitate comprehensive discussion and analysis of workload and appointment issues.

The issues and interests that resulted in creation of the Taskforce were varied and complex, including faculty workload reduction, entrenching research support in the Collective Agreement, improving flexibility, increasing access to List A, and increasing access to sabbaticals.

The Association advocated for specific issues and interests to address faculty workload, and initially proposed an across-the-board reduction of instructional load by 48 SICH. Later in bargaining, the Association modified its proposals to

address faculty workload through a reduction in the Department Average, which would result in a reduction in the teaching load of all faculty members when measured over a three-year period. The objective was to achieve more individual flexibility and a more equitable way of giving faculty capacity to commit extra time to scholarship and service, when necessary.

For the Board, specific issues and interests included the following:

- There is no principled argument to be made for a permanent, ongoing reduction to full-time faculty workload; moreover, such a change bears an additional cost and has potential impacts on the full-time: contract ratio, as well as on the primacy of teaching and the mandate of the University.

Using faculty and work pattern counts as at January 1, 2022 (See Appendix G), a reduction of 48 SICH for all TS and TSS faculty would result in a loss of 17,856 SICH. Were this loss to be replaced with full-time faculty hires, it would require the University to hire 57 new full-time faculty (assuming the same TS/TSS distribution as in our complement). In year one, this would be an additional cost in excess of \$6 million, based on standard hiring rate assumptions.

- List A, with its broad criteria and annual application process, provides an essential function in supporting a variety of faculty interests and priorities, including the extent to which these interests and priorities can change over both time and people. The Board does not believe that List A should be eliminated.
- The Board was prepared to enter into a discussion about how the parties might review evolution of the workload of TSS/TS faculty, including how instructional workload is determined, measured, and modified.

The Board proposed to modify Article 14 to facilitate a greater range of instructional assignments for full-time faculty and, through doing so, to facilitate greater flexibility and equity in workload. This was based on the fact that Article 14 measures workload in three primary ways (two measures at the individual employee level, and one measure at the academic unit level):

- Individual employee level: assigned instruction (SICH) and registrants.
- Academic unit level: department average.

At the time, while the Association was willing to discuss flexibility in instructional workload allocation, it stipulated that any such flexibility must come in the context of decreasing teaching loads overall and be administered equitably and in a way that curtails management discretion that could exacerbate inequities and/or produce a de facto merit system where some faculty are rewarded while others are not.

The closest the parties came to this during the last round of collective bargaining was during statutory mediation when the Association proposed supplementing and absorbing List A reassigned time into a regularized reduction of teaching (one course reassigned every third year for each TS and TSS employee).

However, ultimately, no agreement was reached on these issues; instead, both Parties agreed to strike this Taskforce, under the terms of the MOU previously discussed (see Appendix A).

Requirements of the MOU.

The overarching mandate of the Taskforce is made clear in the MOU signed between the parties, and this guided the structure and approach of the work undertaken. Specifically, the MOU makes clear that the work was to consider the broad parameters guiding full-time faculty workload, in relation to the way they are currently articulated in the Collective Agreement.

Aspects to be examined that have potential to affect faculty workload included, but were not limited to the ways:

- Workload is determined and assigned (consultation between the Chair and the Employees in the Academic Unit, following consultation with the Dean).
- Workload is measured (assigned SICH, registrants, the Department Average).
- Workload can be modified (reassigned time, workload averaging, exception approved by the Employee and the Dean, modification to the Department Average, workload appeal).

The interest-focused approach ensured that these expectations were framed within the issues explored; the approach also ensured that these expectations were considered holistically in terms of their mutual interplay and their collective impact on key considerations, including workload volume and workload distribution.

Key Observations.

When reviewing the full range of options for consensus, lack of consensus, or further exploration, the Taskforce found itself engaged in a detailed discussion about the relative considerations of workload distribution and workload volume. During the last round of collective bargaining, the parties explored what are the best ways to ensure that faculty workload is sufficiently flexible and equitable (see the summary above).

As part of the ongoing evolution of this conversation within the Taskforce, three key observations emerged:

With respect to workload assignment, **there was consensus** that the approach articulated in Article 14.1 continues to work well. **No changes are recommended to this provision.**

With respect to workload distribution, **there was no consensus** about the idea of fully leveraging the Department Average and the instructional workload ranges in the Collective Agreement to provide for greater flexibility and equity in workload distribution across employees.

With respect to addressing workload distribution across employees, **rebalancing responsibilities is unfeasible based on the current system and the differing perspectives of the parties.**

With respect to workload volume:

There was consensus that workload should be equitable across employees, and that reductions in workload (if any) must also be equitable.

There was no consensus on the meaning of equity within the context of instructional workload allocation. This is particularly relevant as it relates to workload volume.

The Association believes that the current instructional workload should be reduced equally for all full-time faculty. Equity issues can be addressed through existing and possible new mechanisms that reduce instructional workload for all.

The Board believes that instructional workload equity would result in the distribution of effort across all faculty being similar. This is at the heart of the generalizable versus non-generalizable perspectives on workload volume, outlined in detail below.

Key finding: there was no consensus on whether workload is a generalizable issue (i.e., one affecting all full-time faculty) or a non-generalizable issue (i.e., a problem of specific groups/individuals).

Through the guidance of the Facilitator, the Taskforce sought to further explore whether workload is a generalizable issue (the Association's view) or a non-generalizable issue (the Board's view).

The Association's View: Volume of Faculty Workload is a Generalizable Issue.

By 2006, Mount Royal College had moved from delivering primarily diploma programs and university transfer courses to offering its own four-year applied degrees and collaborative baccalaureate degrees with Athabasca University. This shift in credential types required faculty to be more current in their field/profession than was needed for diplomas and first- and second-year university transfer courses.

When Mount Royal College became a degree-granting institution and then an undergraduate university, faculty were asked to deliver third- and fourth-year curricula, which demanded currency in the field in a new way. This reality, along with the anticipated increase in service requirements associated with bicameral governance, was recognized with a general workload reduction in 2006 from 432 SICH to 384 SICH, an instructional workload measurement that became the basis for the Teaching-Service work pattern.

The Demands of Scholarly Teaching: More than just Currency.

Since then, as the University has focused on four-year undergraduate degrees, the University has made "proficient and scholarly teaching" a requirement for all full-time faculty. Tenurable faculty are expected to move towards this outcome during the tenurable period and tenured faculty are required to demonstrate proficient and scholarly teaching as part of the promotion process. Senior lecturers are also required to demonstrate proficient and scholarly teaching. This standard is expected to be met in annual reporting required by the Collective Agreement.

Proficient and scholarly teaching requires faculty to devote more time to remaining abreast of developments in the field and in pedagogy. These developments must then be incorporated into classroom teaching practices. This requirement has become more explicit than in 2006 and has generated more work than expected twenty years ago.

The University's Persistent Reliance on Contract Faculty Generates More Work for Full-Time Faculty.

To facilitate the transition to Mount Royal University where more faculty would engage in scholarship and research, the administration of the day decided to increase the number of contract academic staff to deliver courses that were available when full-time TSS faculty took on research and scholarship to fulfill the mandate of an undergraduate university. When anticipated government funding did not arrive to create new full-time positions to deliver these courses, followed by a quick succession of provincial budget cuts and freezes, the temporary increase in contract faculty to teach these courses became a structural feature of the University's approach to delivering its degree programs. Recent data shows that the contract academic faculty continue to deliver the majority of classroom instruction and account for approximately 50 percent of faculty complement (see Appendix G).

The reliance on employing contract faculty has a direct impact on full-time faculty workload. Year-long contract allocation has somewhat reduced the administrative burden associated with reviewing applications for contract work; however, the committee work required to allocate courses continues to place a high demand on full-time faculty time. Moreover, full-time faculty are contractually responsible for the evaluation of contract faculty and take up the task of mentoring and offering collegial support to an ever-changing cast of contract colleagues.

Given that the University has not committed to addressing its over-reliance on contract academic faculty to deliver its programs, the administrative burden of maintaining a high number of contract faculty is burdensome, and will likely continue to remain so into the future.

Mount Royal University's Time-Intensive Teaching and Learning.

The government's focus on experiential learning is a massive shift in programs that now are taking up Work-Integrated Learning. Combined with those programs that have already incorporated such learning into their curriculum means all faculty will need to consider how to provide discipline-specific pedagogical best practice within the present workload agreement. Community service learning requires faculty to engage with community partners to deliver these types of pedagogies, which by their very nature are time intensive. Relationships must be built and maintained; there is intense oversight of student-community contact and expectations; and expertise must be developed by faculty in this type of program delivery.

Student Accommodations.

While all Alberta post-secondary institutions have a legal obligation to ensure that their programs are accessible and inclusive, the University's focus on student-centred learning attracts more students who want their university to be a more supportive environment than larger post-secondary institutions. This environment has created, and continues to create, demand for student accommodations that add to the work of all faculty.

Data from Access and Inclusion Services shows how the demand for student accommodations has grown over 50 percent, from 1,261 students registered with Access and Inclusion Services, to just under 2,000 over the past five years alone (see Appendix L). This demand, which is not anticipated to lessen, layers additional work onto faculty who must adapt their

delivery and learning materials to meet the University's legal obligations for accommodation. Faced with this growing demand, the University has stated that its solution to this challenge lies not by increasing resources to Access and Inclusion Services, but by turning to faculty who are expected to revise their curriculum to incorporate principles of universal design for learning (UDL) (GFC Minutes May 19, 2023).

Gaining the requisite understanding of UDL and then applying it to a specific course requires more than the usual preparation associated with a course. Rather, UDL requires on-going adjustments to ensure that the design is effective and meets the needs of its learners. Such revisions are not a one and done solution and add additional work to the regular revisions faculty undertake to ensure their courses are current.

Accommodating student assessment and evaluation reveal another dimension of the work that faculty must undertake to meet the University's legal obligations for access and inclusion. As Appendix L illustrates, demand for examination accommodations has also risen since 2018, from 7,879 exam requests to 10,461 requests, of which 8,649 were completed (the number of exam requests is higher than the number of completed exams due to a variety of reasons, which include student illness, a student deciding to write with the class, the wrong information was provided, or the request does not overlap with the class and the instructor was not informed). Examination accommodations often entail creating separate exams for each student and then assessing these individually.

The Association fully endorses the principles of access and inclusion in the University and in all courses. The issue here is that the University has downloaded its obligation to accommodate students to individual faculty without recognizing the additional workload or supporting structures that would streamline accommodations. For example, faculty have consistently noted that a centralized testing centre would alleviate the demands associated with examination accommodations. To date, the University has not made such a centre a priority nor does it appear to have any plans to do so. Rather, it prefers to rely on the goodwill and unrecognized work that faculty undertake to meet the University's legal obligations.

Fundamental Changes to the University: Decolonization and Indigenization.

A similar approach is evident in how the University intends to Indigenize curriculum. The Association fully supports both decolonization and Indigenization initiatives at Mount Royal. In terms of Indigenizing Mount Royal's curriculum, the Association supports the University's intention to pursue this largely at the individual course and program level. However, the Association notes that this approach will make additional demands on Indigenous faculty's time and energy. This work entails substantial emotional labour as well. This additional work must be acknowledged both in formal University systems and with adequate resources to support Indigenous faculty who bring their Indigenous ways of knowing and being to the University and its work. We note that Indigenous faculty are also required to do additional work with/in their communities which also must be recognized.

Many non-Indigenous faculty are involved in these efforts. As with taking on principles of UDL, the University's strategies to decolonize curriculum also require faculty to have the necessary time to reflect and revise pedagogy and content, both of which are often deeply embedded in the colonial disciplines that comprise the University's programs. Decolonizing and Indigenizing individual courses takes thoughtful and sensitive planning as well as collaboration with Indigenous members of our University communities.

The Association recognizes and expects that Indigenous faculty who are asked to consult, advise, and guide the curriculum changes that are underway to decolonize and Indigenize the University's programs will be provided with the requisite reassigned time to support these initiatives.

While Indigenous faculty's work as consultants and knowledge keepers must be acknowledged, non-Indigenous faculty will also need time to inform themselves and to unlearn many of their disciplinary concepts and pedagogies. This is a time-intensive activity when done appropriately and, like UDL adaptations, is not a simple "one and done" activity. Decolonizing is an ongoing process of rethinking and redesigning which adds to faculty workload and will do so for the foreseeable future. For the University to succeed in this process, it needs to recognize the work that all faculty will need to undertake now and, in the future, to decolonize the University and its programs.

Increased Class Sizes Increase Faculty Workload.

Enrolment reports suggest that the University's credit enrolments (measured in full-load equivalents, i.e., FLE) have grown by more than 15% over the past decade. Although full-time departures and hiring have fluctuated over the same period, faculty headcount data suggest that the student-to-full-time-faculty ratio has increased substantially over the same period, possibly by as much as 30% since 2013. This trend is especially noticeable in the number of registrants that faculty teach according to appointment category (Appendix G). The impacts of MRSA staff furloughs during the pandemic, likely in response - at least in part - to concurrent provincial funding cuts, compounded the work that faculty have had to undertake. In short, the ratios of students to faculty and to staff have risen since 2006 and 2009, when instructional workloads were adjusted, such that students are experiencing larger class sizes (see Appendix E) and instructional workloads have increased on average (see Appendix H).

More troubling, the University annual reports have, in recent years, been explicit that the strategic priority has been to increase revenue through unfunded growth that has been achieved without growth in the full-time complement³. The University has settled on getting more productivity from all faculty without considering whether increases in productivity, as measured by students taught per instructor, is sustainable.

Changing Work Environment Requires more Training.

In order to mitigate risks and to meet regulatory requirements, there has been a continuing increase in the required training that was not foreseen in 2006.

- All faculty are required to undertake annual training related to cybersecurity, occupational health and safety, and equity, diversity, and inclusion.
- Training demands increase with required committee work when additional training is required.
- The move to a new learning management system is only the most recent example of how all faculty are required to spend more time learning the tools required to do their work (D2L, etc.), which adds to the workload.

³ See the [2017-2018 annual report](#), which states that "[t]he University continues its focus on cost containment, revitalization of credit-free and commercial offerings, and enrolment growth to improve this trend [i.e., the need to secure an operating surplus, despite a revenue-constrained environment, in order to protect the university's other strategic priorities]" (p. 9).

Erosion of Institutional Support for Faculty Work.

While some work has permanently devolved to faculty with the introduction of information systems, the loss of over 100 staff positions since 2020 has devolved more work to faculty. All faculty are now finding themselves having to do more work when support in Student Learning Services (SLS), the Campus Store, the Library, IT services, and the ADC (e.g., D2L support) have been eroded over time.

Due to erosion in the campus store support, faculty have to source learning material themselves and then post it on D2L, ensuring that it meets with copyright requirements so that the University is not at risk. In the Library, there currently seems to be one part-time faculty member responsible for interlibrary loan, and there seems to be a decreasing number of library resources available. This slows down access to learning and scholarship material, and faculty have to spend extra time finding alternatives.

Elsewhere, IT services often cannot answer the phone and it takes them a while to get back to email messages, leaving faculty to spend extra time finding solutions in the interim. Specialist support for D2L lacks time to respond to phone requests for assistance, so faculty must email requests where the details often get lost in the email communications and take up valuable time to get answers.

While the Association acknowledges the impact of the provincial government's austerity measures on the post-secondary sector, the impacts of these cuts are felt by faculty whose work has increased incrementally as cuts take their toll.

Changing Student Body, Especially with Respect to Students' Mental Health.

There has been an increase in student mental health issues. With the decrease in counselling services and the push to use the student Early Support program, faculty have to take more time to address mental health issues with students. There is also an increase in students lacking basic skills for courses, and with the decrease in SLS support staff it falls on faculty to address these oversights. Assisting students with these concerns creates more stress for faculty which can also impact their mental health.

Upward Drift of Expectations to Meet Tenure and Promotion Criteria.

The University Tenure and Promotion Handbook (2020) identifies teaching criteria that include ten criteria related to competent teaching and an additional five criteria for proficiency. Scholarship must be significant and service moves from participation to substantial contributions, and the examples for substantial service are heavy commitments. Service may be misunderstood to be at all three levels of the University. Moreover, the statement in the Handbook that exceeding in one area does not lower standards for other areas has often led tenurable faculty to believe they must exceed standards all around.

TSS Faculty are Required to do Research without the Support of Teaching Assistants.

Other Canadian universities that offer graduate degrees are able to recruit teacher assistants who can deliver tutorials and assist with student assessment and evaluation. Since the University is a teaching focused undergraduate institution without teaching assistants, TSS faculty are required to mark all assignments and conduct all student assessments while still having to engage in research and scholarly activities. (TS faculty must also ensure that pedagogy is current and appropriate so engage in scholarly activities.)

Moreover, many TSS faculty have engaged research assistants, a development not foreseen when workloads were adjusted in 2009/10 for faculty appointed to the TSS work pattern. Moreover, as faculty have received more Tri-Agency funding, TSS faculty are called upon to manage projects, including reporting on the project's progress and expense both internally and externally. TSS faculty are required to engage in this work without the necessary infrastructure and time that other universities provide.

TS and TSS Faculty Spend Increased Time and Complete More and More Paperwork.

The number of applications to support teaching innovation, and scholarship and research, has increased dramatically since 2009 when the work patterns were created. Detailed faculty annual reports to annual tenure reviews, to teaching evaluations and Human Research Ethics applications, and Internal Research Grants Fund applications have dramatically changed the work of TSS and TS faculty. These applications and reports take anywhere from one day to a couple of weeks to complete. In particular, evolving research ethics and compliance processes have increased the labour and time involved in completing scholarship. Conducting research now involves increasingly complex and time-consuming processes, especially when faculty complete field studies and/or interviews.

Finally, increased faculty turnover and decreased retention puts extra pressure and workload on the faculty who continue to work at the University. The University saw at least 6 mid-career full-time faculty leave for other universities.

We have seen faculty attrition which until recently has led to positions that have not been replaced. When existing positions are not replaced, the workload for remaining faculty, especially in small academic units, increases since the service requirements, among other considerations, do not change.

Full-time Faculty Complement by Year

Year	2017	2018	2019	2020	2021	2022	2023
Number of Full-time Faculty	367	382	394	384	380	404	436

Comparing Mount Royal University's Teaching Loads to Those in Other Institutions.

The University's faculty compete with other faculty across Alberta and Canada. The Association believes that we must look to other similar comparable institutions to assess whether the instructional load is appropriate.

National Comparators.

More teaching is required than at other comparable undergraduate universities in Canada in terms of their size and undergraduate focus, namely, the universities ranking 16-19 on Maclean's 2023 University ranking. These are universities the Association believes represents our best comparators since they also focus on smaller undergraduate class size:

- Mount Saint Vincent University: no work patterns, 5 courses.
- Brandon University: no work patterns, 5 courses.
- Nipissing University: teaching stream 6 courses, research stream, 5 courses.
- Cape Breton University: Lecturer 6 courses, faculty with rank, 5 courses.

Notably, these institutions offer only a few Master's programs, with their main focus on undergraduate education. The Association notes that undergraduate universities are better comparisons to Mount Royal University than the top universities, which are primarily research universities with robust graduate programs.

Provincial Comparators.

Granting that a comparison of the teaching load of the University's TS and TSS faculty to other undergraduate universities with small class sizes (30+ average) in Alberta is necessary, given the government's focus on system-wide difference, we offer the following observations:

- MacEwan University: 6 courses for TSS (with a mechanism opening up the possibility of 5 courses), 8 courses for TS (some with no possibility of promotion).
- St. Mary's University: 6 courses for TSS, 8 courses for TS.
- Concordia University of Edmonton: 6 courses for TSS, 8 courses for TS.

The Association notes, however, the fact that the increased labour required for teaching in the last decade remains and that the principle of equal labour and equal wage is not upheld any longer in the province of Alberta in the post-secondary sector. As noted above, TSS faculty of the undergraduate universities of the Alberta province, including those of the University, are especially disadvantaged since they have to compete for federally-funded research grants alongside undergraduate universities in other provinces, where faculty have lower instructional loads.

The Association is interested in solutions to this problem that:

Are equitable with respect to all full-time faculty (TS/TSS, Senior Lecturers, Laboratory Instructors).

Focus on individual autonomy and collective decision making, restricting management discretion in making individual workload decisions.

Reduce, or at a minimum, not increase, the reliance on contract faculty.

Expand the full-time complement where pathways exist for contract faculty who have proven themselves over time to access permanent/tenured positions.

The Board's View: Volume of Faculty Workload is a Non-generalizable Issue.

The Board believes that workload volume of full-time faculty is a non-generalizable issue, or at least that there are significant non-generalizable components. It was noted that at the centre of discussions about workload volume, there still appears to be the fundamental question: to what extent does the narrative almost always circle back to instructional workload/teaching? To some extent, this is not surprising, since instruction is the primary, if not exclusively, assignable component of workload.

The Board believes that it is important to contemplate the volume of all workload components (i.e. teaching, service, and scholarship). The approaches to each are not the same from a volume perspective. It is not the case that a full-time faculty member experiences high volume due to all three components; and, it is not the case that all need to be independently solved/addressed at the same time (there is an interplay/dependency of impact).

The Board notes that there was consensus on looking at the service burden of the University. While this situates service volume as a generalizable issue, from the perspective of the Board, such a conclusion only exists when measured at the level of the University.

The Board does not view high service volume/service burden as something that is experienced by all full-time faculty, and notes that there is an intersection with workload expectations and accountability; service volume is unevenly distributed across employees and much is subject to self-determination/is self-directed.

The Board offers the following textual comments for why it thinks the volume of faculty work is a non-generalizable issue:

- Equity involves acknowledging when workload reduction/change may be most needed, which is different from the notion of an across all-employee reduction. Put another way: what are some of the characteristics of faculty members who have a high/too heavy a workload? This can be characterized according to groups, work, and functions. It's complex, not simple, and it can change over time and career stage.
- Challenges exist with expectations versus self-determined work and the tension therein. This is particularly applicable to service and scholarship, which is typically work that is not assigned. The expectations of individuals are also a factor, raising the question of what contributes to volume? More of a particular type of work is not always required or expected.
- Expectations for tenure and promotion have not changed, but the University has made clear a desire to build upon success with securing external funding, i.e. significant scholarship, which is non-generalizable.

The Board was tasked by the Facilitator with identifying characteristics of faculty members who have a high/too heavy workload. The following was offered:

- Faculty working during the early stages of the tenurable period. There are very high demands on time, and there is a need to think about how such faculty can accomplish their responsibilities and succeed in their roles based on equitable workload expectations.

- Faculty discharging programs of significant scholarship, where this aligns with the direction the University has clearly signaled it wishes to go. Quality and significance/impact of scholarship are relevant.
- Faculty engaging in extensive student mentorship activities, notably those which extend beyond assigned teaching (honours, independent study, directed readings).
- Faculty who are making certain kinds of distinct contributions to the institution. This includes the unique aspects of Indigenous Knowledge and Perspectives, the work of Indigenous faculty members, and the extensive informal mentoring or engagement activities that may fall particularly on BIPOC faculty.
- Faculty undertaking certain distributions and assignments of teaching loads; not all teaching loads are created equal, particularly when the only explicit measures in the Agreement are SICH and registrants. A related example is the significant disparities in registrants associated with the instructional workloads and course preps of some faculty.
- Faculty undertaking significant activities that are periodic in their nature, e.g. program development, program review, and program accreditation activities, coordination duties, and curriculum reform.
- Faculty undertaking high volume, high intensity service work, which could be internal or external. It could be required by professional associations or accrediting bodies, or it could be in support of learned societies or granting agencies.

The Board is interested in specific solutions that seek to address these characteristics and observes that all of the above considerations still need to be viewed through the lens of existing provisions in the Collective Agreement and at the University, the extent to which these provisions are accessed, the reasons for accessing them, the demand for them, and the basis upon which they are used. These provisions include:

- List A and reassigned time for coordination/advising.
 - ORSCE reassigned time and externally funded reassigned time.
 - Workload averaging.
 - The Department Average.
 - Changing work patterns.
 - Sabbaticals.
 - Workload appeal.
-

SPECIFIC CONSIDERATIONS RELATED TO FULL-TIME FACULTY WORKLOAD.

Within the context provided by the above, the Taskforce furthered its broad discussion related to full-time faculty workload. This included consultation with relevant stakeholders (Counsellors, Educational Developers, Librarians, Laboratory Instructors, and Senior Lecturers); information from these consultations was used to frame the requisite sections below that concern these specific employee groups.

Workload of TS and TSS Faculty.

Following exploration of the broad parameters guiding full-time faculty workload, and engagement in an interest-focused brainstorming exercise to generate potential solutions, sorting of the options resulted in their organization into four thematic groupings: determination, amount/quantity, modification, and system or Collective Agreement change (see coding in Appendix D). Specific interests were encapsulated within each of these groupings. The importance of establishing expectations bridged three of the four groupings; other interests included flexible work plans and “levelling the field” (more context below).

The Taskforce arrived at some foundational/fundamental determinations that informed its ongoing work. These provide essential context, since all observations, perspectives, and recommendations in this report, including those for Senior Lecturers and Laboratory Instructors, need to be understood with respect to these commitments.

Those recommendations are as follows:

SICH should remain the measurement

Having reviewed alternatives to Scheduled Instructional Course Hour (SICH), the Taskforce recommends that SICH remain the measurement of instructional load in the Collective Agreement.

The Taskforce sees no compelling reason in the foreseeable future for moving away from SICH as the standard for defining and measuring instructional load. At the same time, the Taskforce recognizes that workload has many complex dimensions and no single indicator is, in and of itself, sufficient to accurately portray a faculty member’s total workload.

However, the current definition of SICH in Article 1 does not explicitly note a Scheduled Instructional Course Hour also includes the time for preparation of materials for instruction and the assessment of student work. A more accurate expression of instructional workload is 1 SICH (including, among other factors, class preparation, student assessment, and student contact) multiplied by the number of weeks of instruction (currently agreed to be 16 weeks in Fall and Winter semesters) multiplied by the number of instructional hours (usually 3 per week but can vary).

Instructional workload also includes a relationship to number of registrants in the Collective Agreement. When class sizes vary, faculty use their professional judgement to adjust pedagogical approaches, including assessment, to fit the allocated SICH. To summarize: 1 SICH (prep and assessment) × 16 weeks of Instruction = 16 SICH × 3 hours of instruction = 48 SICH in light of the number of course registrants.

The Association believes that since SICH was developed when on-line delivery and emergency remote teaching was not imagined, the Collective Agreement should acknowledge that it refers to preparation, teaching and assessments when instruction is done in person in a physical classroom/lab or studio. SICH should be examined to address on-line delivery as well as flex/hybrid and remote teaching modalities.

There should be no complex workload formulas

Having reviewed approaches in other Collective Agreements, including Ontario's Colleges of Applied Arts and Technology's Standard Workload Formula (SWF) (See Appendix I for a sample SWF and guidelines to interpret the formula) the Taskforce recommends against moving to a detailed formula-driven approach for the determination and calculation of full-time faculty workload.

The TS and TSS work patterns should remain

The Taskforce recommends that there be no change to the premise of two work patterns; one that is based on engagement in teaching, scholarship, and service (TSS), and another that is based on engagement in teaching and service (TS).

Moreover, the Taskforce notes that the TS work pattern is not a vestige from Mount Royal College; appointments to the TS work pattern continue to be made and it is expected that there will be TS appointments in the future.

The Taskforce was unable to reach consensus on any considerations for changing work patterns, beyond the procedures currently outlined in the Collective Agreement.

A sense of scale of change, and appetite for it, is encapsulated in the recommendations above. The Taskforce concluded that it was not contemplating a fundamental alteration to the way full-time faculty workload is measured and determined at the University

As part of the review of options for consensus, lack of consensus, or further exploration required, the following were identified by the Taskforce as additional recommendations:

Expectations related to service commitments should be examined

This should be undertaken with a view to exploring a reduction in the demands of this work. One way in which this could be achieved is to place stronger parameters/constraints on the demands of University service; tangibly, this could involve establishing a broad mandate to reduce the number of meeting hours by a prescribed amount/percentage. The Taskforce emphasizes the importance of creating a measurable goal/outcome.

An alternative option discussed by the Taskforce was the creation of a working group to more closely examine the time demands of different service activities, using the tables in the institutional tenure and promotion criteria document as a framework/guide.

Efforts should be made to improve the culture of meetings at the University

The Taskforce recommends that there be efforts to streamline how meetings are structured, to more clearly define their intended outcome(s), to ensure meetings are timelier and more focussed.

The Taskforce believes that this may benefit from professional development and related training/orientation. Real improvement will demand systemic change, because meetings affect how people collaborate and how they get their

own work done. The high volume and duration of meetings is certainly part of the norms of service and governance at the University and this cannot be divorced from the intimate link with inclusivity in our organizational culture.

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Workload considerations for faculty early in the tenurable period should be examined

There are very high demands on the time of new faculty, and there is a need to think about how they can accomplish their responsibilities and succeed in their roles based on equitable workload expectations. In particular, this should include an assessment of normal teaching loads prior to the mid-term tenure evaluation and expectations of service contributions/criteria during the same period. Similarly, specific service expectations should be considered in relation to other career stages (e.g., newly tenured, mid-career, etc.).

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Existing options in the Collective Agreement that intersect workload volume and workload distribution/flexibility should be more clearly and proactively communicated

Examples of these options include working with Chairs Assembly and other stakeholders to communicate about the utility of the Department Average (including the Conceptual and Actual Department Average, and the mechanism by which the reductions of the Actual Department Average are approved), the availability of reassigned time, averaging of instructional workload (Article 14.8.3), and access to sabbatical leaves.

Resourcing for core academic supports at the University should be examined, with a view to increasing their efficacy

Examples of these include the capacity of Access and Inclusion Services, the approach to academic advising of students, and support for administrative aspects of research. A key objective is to reduce the current administrative burden of these activities on faculty.

While Appendix D offers a comprehensive account of all options, their categorization, and their sorting (consensus, no consensus, potential for exploration), the Taskforce considers it important to highlight some specific areas with potential for further exploration. These include

- Increasing reassigned time provisions (e.g., List A) generally, or for specific functions/activities.
- Identifying ways to effectively assess the quality and quantity of online teaching, including the intersection with SICH.

- Assessing the utility and benefits of a minimum number of registrants (in addition to the current registrant cap) as a component of TS and TSS faculty workload.
 - Reviewing workload holistically, including how expectations are articulated, the intersection of workload assignment, the annual report, and performance review.
-

Different Views on List A.

The List A reassigned time mechanism was created in the July 1, 2002 to June 30, 2004 Collective Agreement. The funds in List A (Article 14.9.1.2) have grown over time; \$500,000 is currently allocated to List A. The Agreement also contains the provision of funding for program coordination and faculty advising (Article 14.9.1.4); \$700,000 is currently allocated to coordination and advising. The Taskforce also discussed whether List A, if adequately resourced, would solve the workload volume issue.

The Board holds that List A is a useful resource to support a variety of activities and initiatives on an annual basis.

The Association holds that eliminating List A would provide a significant resource better used to address the workload volume problem faced by all faculty and would address its discomfort with the degree of management discretion embedded into the List A distribution mechanism.

There was no agreement on this question.

In concluding this component of the report, it is worthwhile returning to the central issue: workload volume. A variety of the recommendations of the Taskforce above intersect workload volume, and while they do not necessarily create generalizable impacts, they nonetheless contribute to addressing the issue. It should be clear, however, that there remains a lack of consensus between the parties about whether workload volume is a generalizable or non-generalizable issue.

As part of this report, the Taskforce has provided extensive context for the varied interests related to workload volume, including the detailed perspectives of the parties. This is very much in keeping with the primary purpose of this report, which is to inform and assist bargaining by documenting, comprehensively, a full exploration of the issues using an interest-focused approach.

The sections below deal with the outcomes of specific consultations with Counsellors, Educational Developers, Librarians, Laboratory Instructors, and Senior Lecturers.

Counsellors, Educational Developers, and Librarians.

Counsellors.

The workload of full-time and limited-term Counsellors is outlined in Article 14.10.6 of the Collective Agreement. Workload includes an average number of hours of direct client contact time plus associated administrative time each week (normally an average of 22 hours and 16 hours for TS and TSS Counsellors, respectively). A Counsellor teaching a 48 SICH course is released from six hours of direct client contact time and one hour of associated administrative time

per week during the semester in which the course is taught. Primary observations deriving from consultation with Counsellors include:

- The content and complexity of counselling work has changed over time. More follow-ups and more documentation are required, and there is a greater need to connect clients with additional resources.
- The resourcing in Counselling Services has not evolved with growth at the University, and the unit believes that there is a need to increase the current complement of Counsellors.
- There are administrative and perceived budgetary challenges associated with counselling services that are delivered by contract faculty. Counsellors believe that the internal funding, which historically provided for predictability and sustainability in the unit, has been eroded. This has impacted certainty of backfill by contract Counsellors and the amount of work they are able to allocate. The process of securing contract Counsellors and assigning their responsibilities has created an additional burden for full-time employees in the unit.
- There are additional demands on Counselling Services during the summer months, including preparation ahead of the Fall semester; front-of-house staffing during this period was cited as being insufficient.

Educational Developers.

The workload of full-time and limited-term Educational Developers is outlined in Article 14.10.5 of the Collective Agreement. Workload for TS and TSS Educational Developers includes a balance of scheduled and non-scheduled duties equivalent to the instructional component of the TS or TSS work pattern. For TSS Educational Developers, scheduled duties are to be arranged so that there is sufficient time for the pursuit of scholarship. Primary observations deriving from consultation with Educational Developers include the following:

- Conversations about workload, including its components and its volume, are difficult as there is a lack of consensus among Educational Developers about the categorization and quantification of certain activities.
- The way that duties equivalent to the instructional component of the TS and TSS work pattern are conceived is challenging, as this has demanded determining SICH-equivalencies for the various duties of Academic Developers. There is disagreement on SICH-equivalencies and their determination. Additionally, what is considered Educational Developer workload (versus service) has changed over time. Educational Developers believe that the changing nature of the institution has created increased demands on their work and expertise (more areas of specialty, more modalities of delivery, new faculty hires, etc.).
- The fluidity of workload is a nuanced aspect. Requests for support can come at any time of the academic year; when coupled with preparation for New Faculty Orientation, this can mean that the rhythm of the work of Academic Developers is different. It is less likely to follow the cadence of a semester and more likely to be at a constant level throughout the year (including the intersession). In this sense, parallels with the somewhat “closed” nature of a course (i.e., it has a clear beginning and end) are less obvious. Parallels between teaching students and faculty development were also cited as being less obvious.
- Educational Developers view some aspects of their work to involve high stakes. Specific examples include challenges with turning away requests for support, impacts of efforts on the success of sessional

reappointments, or a less than positive outcome of a curriculum redesign project in the hands of a faculty member (i.e., reputational impact on the Academic Developer).

- Some Academic Developers believe that scheduled duties, coupled with workload volume, do not create sufficient time for the meaningful pursuit of scholarship.
- There are administrative challenges associated with support, and this has resulted in work being downloaded onto Educational Developers. Some believe that the current configuration is not conducive to fulfilling the full scope of responsibilities and believe that capacity for coordination and related professional support is missing.

Librarians.

The workload of full-time and limited-term Librarians is outlined in Article 14.10.5 of the Collective Agreement. Workload for TS and TSS Librarians includes a balance of scheduled and non-scheduled duties equivalent to the instructional component of the TS or TSS work pattern. For TSS Librarians, scheduled duties are to be arranged so that there is sufficient time for the pursuit of scholarship. Primary observations deriving from consultation with Librarians include the following:

- The volume of workload components is variable based on the area or discipline supported. Work schedules are flexible and not standardized. Workload is dynamic and is adjusted based on the evolution of institutional needs.
- Librarians have varied perspectives of what contributes to workload volume; some believe that there is no “baseline” quantity as a starting point. It was indicated that assignments are by subject and not teaching area (which can create asymmetries in amounts of library instruction), that each class requires custom preparation, and that not all prepared materials can be reused.
- Managing collections was cited as an ongoing task. Specific examples of factors contributing to workload include the number of class sections and number of different courses a Librarian oversees, the impact of projects, committee roles (representation within a relatively small cohort of Librarians), and technological change/advancement. It was indicated that support staff can help alleviate administrative tasks.
- Some Librarians indicated that they experience workload volume issues periodically, while others believe that, over time, a volume issue has developed. Some Librarians believe there is a lack of transparency in workload allocation, leading to perceived inequities in workload distribution. Some Librarians indicated that there is insufficient clarity on what constitutes “overload.”
- Librarians indicate that the nature of workload has evolved, including as it relates to modality and teaching (some instructors want resources to be provided in two modalities). While in some disciplines the demands have decreased, it was indicated that the number of daily tasks has increased at a greater rate and volume. Some tasks previously managed by support staff are viewed as now having been offloaded to Librarians, compounding the perceptions of those who believe workload volume has increased.

Areas of Consensus and No Consensus, Recommendations.

The Taskforce reviewed and discussed the feedback collectively received from its consultations with Counsellors, Educational Developers, and Librarians. The context of the workload of Counsellors, Educational Developers, and Librarians does present some nuances and unique aspects.

- The workload for Counsellors is separately specified in Article 15.10.6, while Educational Developers and Librarians share common clauses (Article 14.10.5).
- For Counsellors, client contact time and how this time is modified when teaching a credit course is explicitly outlined in the Agreement. This specificity is helpful for understanding the workload of Counsellors.
- For Educational Developers and Librarians, primary duties (i.e., not service and/or scholarship expectations common to all TS/TSS employees) are assigned as equivalent in volume to the instructional component of the TS and TSS work patterns in Article 14.4 and 14.5, respectively.

Because of this notion of “SICH-equivalent” work, the Taskforce agreed that many of the issues raised overlap with the broader commentary in this report about workload volume and workload distribution, and consideration of these issues is not duplicated here.

What these three groups of employees have in common is that some members from each group indicated that the content and complexity of their work has changed over time. The basis for this increased complexity is linked to the role, e.g., increased documentation and resource referrals for Counsellors, the evolving landscape of the post-secondary sector and shifting priorities for the institution for Educational Developers and Librarians.

A second common theme is that workload is fluid; requests can be made at any time of the year, or due to emerging institutional needs, and some believe this to be at odds with the notion that workload is assigned by the middle of February immediately preceding the academic year in question. This theme was particularly germane to the workload of Educational Developers and Librarians.

Conclusion.

The Taskforce did not generate any recommendations specific to the workload of Counsellors, Educational Developers, and Librarians.

The Teaching Service Work Pattern and Senior Lecturers.

The terms and conditions of the Senior Lecturer role are outlined in Articles 6.13-6.25 of the Collective Agreement; the MOU “Creating and Phasing-in of Senior Lecturers” is also relevant. Primary observations deriving from consultation with Senior Lecturers include the following:

- There is an instructional workload inequity (volume) when compared with other full-time (TS/TSS) faculty, particularly as it relates to registrants.

- There is a lack of clarity regarding what is an appropriate volume of service.
- Eligibility for certain types of service work and other entitlements is either unclear (research funding, various committees outlined in the Collective Agreement) or problematic (sabbatical leaves).
- There is an insufficient consistency of understanding about the role by Department Chairs.
- Job security, prioritization of teaching assignments, primacy of teaching, and “internal first” position postings were among the positive attributes of the role.

Areas of Consensus and No Consensus, Recommendations.

The Taskforce reviewed and discussed the feedback received from its consultation with Senior Lecturers. Some of the issues overlap with discussions concerning pathways, and the Senior Lecturer/TS roles; consideration of these issues is not duplicated here. Those issues raised that are new, and within the scope of the mandate of the Taskforce, are specifically documented.

As part of the review of options for consensus, lack of consensus, or further exploration required, the following were identified by the Taskforce as recommendations:

The service opportunities available to Senior Lecturers, as well as the accompanying service expectations, should be clarified in the Collective Agreement

The Collective Agreement currently outlines a range of opportunities for service (e.g., selection committees, standing committees for sessional appointments, peer reviewer) from which Senior Lecturers are currently excluded. As the role becomes more established, it is appropriate to review the opportunities available for Senior Lecturers to participate and contribute. It is important that this be done in a manner that respects the limited service expectations for Senior Lecturers.

The service expectations of the Senior Lecturer role should be clarified with Department Chairs and/or through updates to University-level resources (e.g., a handbook)

Anecdotal reports suggest concerns that the service guidelines established for tenure were being referenced as a resource to guide permanency expectations for Senior Lecturers. Service expectations should be clarified both for achieving permanency, as well as on an annual basis (permanent Senior Lecturers).

The parties did not reach consensus on the issue of sabbatical eligibility for Senior Lecturers.

The Association believes that Senior Lecturers (and Laboratory Instructors as discussed below) should be eligible to apply for sabbaticals/professional leaves, and notes that the annual quota of sabbaticals is rarely fully allocated, so there are sufficient resources to meet such requests.

- The template for the Senior Lecturer position was the job description of full-time faculty prior to 2006. In that model, faculty were eligible to apply for professional leaves and as such, all permanent employees should have such eligibility.

- The Association views sabbatical leaves as offering important professional development opportunities for Senior Lecturers and Laboratory Instructors, allowing them to realize professional growth within the scope of the role, as well as to improve their CVs for future employment opportunities.
 - The Board notes that at present, only tenured faculty are eligible to apply for sabbatical leave; there are two categories of permanent employees (Senior Lecturers and Laboratory Instructors) and neither are eligible for sabbatical leave. These are teaching-focused positions which have limited additional responsibilities and expectations; the Board does not support their inclusion in sabbatical eligibility provisions.
 - The Board also believes that differentiation of the Senior Lecturer position from the TS role was intentional; this differentiation is currently somewhat tenuous and the distinction between these roles should not be further eroded.
-

Laboratory Instructors.

The terms and conditions of the Laboratory Instructor L1 and L2 roles are outlined in Articles 6.1-6.12 of the Collective Agreement; it is important to note that effective July 1, 2023, there are no Laboratory Instructor L1 incumbents. Primary observations deriving from consultation with Laboratory Instructors include the following:

- The duties of the Laboratory Instructor L1 and L2 roles are outlined in Articles 6.4.2 and 6.4.3, respectively. Both roles have workloads that are composed of instruction and related duties; the instructional workload for the Laboratory Instructor L1 role is higher, and the range of related duties for the Laboratory Instructor L2 role is both broader and more involved.
- The duties for a Laboratory Instructor L2 are outlined in a non-exhaustive list in the Collective Agreement; their range and scope were corroborated through the consultation, and additional duties were also shared (e.g. D2L site design, facilitating student accommodations in the laboratory environment, providing and/or finding cover due to instructor absence, equipment inventory, and general troubleshooting).
- There are concerns about workload volume. Laboratory Instructors experienced significant impacts during the pandemic; they view themselves as solely responsible for the evolution of laboratory curriculum in the courses they teach; the demands of course coordination can be significant; and there can be sizable differences in registrants across L2 incumbents due to the SICH allocated to laboratory sections (e.g. three-hour labs versus two-hour labs, and the number of required sections to meet instructional workload).
- There are concerns about the implications of future B-wing renovations, given that current design planning would see the size/capacity of first year laboratories increase (to 24 students).
- The lack of any active Laboratory Instructor L1 roles as of July 1, 2023, provides an opportunity to revisit the terms and conditions of Laboratory Instructors.
- Laboratory Instructors believe that their work and expertise does not garner the recognition it deserves, and that a change in title may alleviate this (e.g., Laboratory Faculty).

Areas of Consensus and No Consensus, Recommendations.

The Taskforce reviewed and discussed the feedback received from consultation with full-time Laboratory Instructors. Some of the expressed concerns about workload volume reflect the significant heavy-lifting that was demanded specifically of Laboratory Instructors during the pandemic. Other drivers of volume may not be generalizable across the complement of full-time Laboratory Instructors, and any options to address the issues ought to be responsive to the particular needs. It was also noted that while there are elements of the Laboratory Instructor role that may benefit from greater clarity (including the intersection with the roles of program/course coordinators, TS/TSS faculty, and the Department Chair), there remains an important intersection between expectations and self-determination of responsibilities.

As part of the review of options for consensus, lack of consensus, or further exploration required, the following were identified by the Taskforce as recommendations:

The definition of Laboratory Instructor L1/L2 should be reviewed to ensure it reflects the employees' status as full-time faculty members

Any update to the definition should reflect the status of Laboratory Instructors L1/L2, i.e., that they are full-time faculty members with a range of professional responsibilities and expertise.

Full-time Laboratory Instructors should inventory their current responsibilities and make this information available to the bargaining teams

This inventory is an essential starting point for ensuring position clarification. It will allow a clear assessment of how well the current language (i.e., Articles 6.4.2 and 6.4.3) is understood and/or serving Laboratory Instructors, and offer insights into scope and volume of workload.

FACULTY APPOINTMENTS AND PATHWAYS.

This section provides an account of the issues and interests related to faculty appointments and pathways. The primary focus is on the categories of Senior Lecturer and the Tenurable TS role, including how these roles are differentiated and the pathway to each. Specific issues, interests, and options related to the workload of Senior Lecturers are primarily captured in Section B above, although for clarity some duplication may be observed in this section.

Introduction to the Issues and Interests.

The creation of the Taskforce acknowledged that predictability and certainty of employment has been a priority in previous rounds of collective bargaining. With a focus on contract faculty, this includes interests in providing more certainty and predictability of employment, reducing the University's reliance on contract faculty, and extending opportunities for permanent, full-time positions (so-called pathways).

During the round of bargaining that resulted in the July 1, 2018 to June 30, 2020 Collective Agreement, the Board and the Association engaged in several interest-focused discussions with a view to addressing an "overreliance on contract faculty" and a "structural deficit in full-time faculty"; a variety of options were reviewed as part of these discussions. The parties agreed to the following changes related to predictability of employment for contract faculty, and extending opportunities for permanent, full-time positions to contract faculty:

- Creation of the Senior Lecturer role, a permanent category of employment, with an annual instructional workload of 384-480 SICH, and limited service expectations. This included commitment to a six-year transition period, ending August 14, 2025, during which there would be no new appointments to Fixed-term positions and where the total number of Fixed-term plus Senior Lecturer positions would be at least twenty-five. During the transition period, first consideration for appointment to all Senior Lecturer positions would be given to internal applicants; up to one year of credit toward the probationary period may be awarded on the basis of previous employment at the University. The parties agreed to create at least seven Senior Lecturer positions over the life of the Agreement. If successful in a subsequent application for a TS or TSS appointment, a Senior Lecturer can apply for up to two years credit toward the tenurable period.
- Provision of full-year course allocations (Spring, Summer, Fall, Winter) for contract faculty.

With respect to the round of bargaining that resulted in the July 1, 2020 to June 30, 2024 Collective Agreement, the parties agreed to create the Taskforce to facilitate comprehensive discussion and analysis of the categories of Senior Lecturer and the Tenurable TS role, including how these roles are differentiated and the pathway to each.

During the last round of negotiations, the issues and interests that resulted in the charge of the Taskforce to consider the categories of Senior Lecturer and the Tenurable TS role did not surface in their entirety until statutory mediation, a reflection of the complex nature of collective bargaining, and efforts to reach settlement.

The specific options identified at the time included sabbatical leave eligibility for Senior Lecturers, a pathway for converting Senior Lecturers to TS appointments, and complement language and/or preferential hiring of internal candidates for tenurable positions. As the MOU "Regarding a taskforce to review full-time faculty workload and

appointment categories” makes clear, the appointment categories of Senior Lecturer and the Tenurable TS role were raised by the Association.

Requirements of the MOU.

With respect to faculty appointments and pathways, the mandate of the Taskforce is made clear in the MOU signed between the parties, and this guided the structure and approach to the work undertaken. Specifically, the MOU makes clear that with respect to the categories of Senior Lecturer and the Tenurable TS role, the Taskforce shall focus on how these roles are currently differentiated and the pathway to each role.

Observations.

Using the same interest-focused approach as for full-time faculty workload, the Taskforce explored issues related to faculty pathways to permanent appointments, and issues related to how the Senior Lecturer and Tenurable TS roles were differentiated. The Taskforce engaged in a discussion about perceptions of pathways as they exist in the current Collective Agreement. Important observations included the following:

- Existing pathways for contract faculty, through the initial appointment and reappointment process (Sessional), Continuing-term appointments, and the Fixed-term and Senior Lecturer roles (Appendix K).
- The specific period of time during which all available Senior Lecturer roles will be posted internally first.
- The potential for a Dean, at their discretion, to post any full-time position internally only.
- The Board’s team pointed to the success of internal applicants in competing for tenurable positions that are filled through open competition (see Appendix F).
- Credit towards the tenurable period for those holding prior Senior Lecturer appointments has also been successful.

Based on this discussion, the Taskforce sought to arrive at a shared understanding and conceptualization of pathways and the related notion of “regularization” (this included seeking to define both).

The Taskforce also reviewed at a high level how the notion of pathways had been evolving at other post-secondary institutions. This discussion included changes to the Collective Agreement at MacEwan University, in its most recently concluded round of bargaining, which resulted in the creation of a pathway from their Sessional-Extended role (somewhat analogous to the Continuing-term appointment at Mount Royal) to a tenured Assistant Professor position (referred to as the “MacEwan model” by the Taskforce). Specifically,

- Candidates holding Sessional-Extended appointments are considered for an available tenurable appointment (TS) conducted through an internal search.

- The successful candidate is assigned the rank of Assistant Professor and the employee is subject to a three-year probationary period (automatically reduced from the normal five years for tenurable appointments).
- The employee is ineligible for promotion to Associate Professor or Professor for the duration of their appointment, and is ineligible for movement between work patterns for the duration of their appointment.

Regularization and Pathways (Formal and Informal).

When reviewing the full range of generated options (see Appendix J) for consensus, lack of consensus, or further exploration, and in consideration of the other relevant information as outlined above, the Taskforce arrived at some key, initial determinations that informed its ongoing work. These provide important context for remaining observations, perspectives, and recommendations outlined below for faculty appointments and pathways. The Taskforce agreed that:

- The shared understanding of the Taskforce is that the term “pathway” refers to deliberate and intentional bias towards particular employee groups (e.g. current contract faculty) to progress to another category, with signposts along the way. A pathway can include certain steps an applicant would have to take, and certain criteria they would have to meet, in order to move from one category of appointment to another (see Appendix K).
- The tenure system is the most evolved pathway in the University, with clearly defined ranks, processes to attain those ranks, and clearly specified criteria. A handbook provides guidance to faculty and management alike about the system and application of criteria.
- The term “regularization” refers to the automatic conversion from one category of appointment to another, largely driven by time in role. The Taskforce agreed that regularization which involves the conversion of a Senior Lecturer to a tenurable role is not a pathway as defined above.

The primary reasons for this were that not all Senior Lecturers may meet the requirements for a tenurable role, that time served in one position is not a sufficient criterion to access another position, and that regularization can often lead to unintended consequences (e.g., in the case of conversion of a Senior Lecturer to a tenurable role, this could disincentivize the creation of Senior Lecturer positions, negatively impacting eligible contract faculty).

Conversely, there was agreement that once a Senior Lecturer position is created to teach specific courses, there may be a disincentive for academic units to create a tenurable position in the same area (e.g., once a Senior Lecturer position is created in Creative Writing, there is no incentive for the academic unit to create a similar tenurable position in the same area).

The Taskforce engaged in extensive dialogue about pathways. While the Taskforce reached agreement on a broad definition of the term, it was clear that there were a number of different perspectives on how pathways were envisioned. They cover a broad spectrum, and included:

- Criteria and an accompanying application process are defined in advance; these detail how a Senior Lecturer may transition directly into a tenurable role. They are conditional upon the approval of a Senior Lecturer

incumbent’s application for the tenurable role and are preceded by the creation of a tenurable position in the requisite academic unit (allowing for the process to play out).

- Creating a preference for the hiring of an internal applicant, through an otherwise open competition, i.e., if a tenurable position is posted, the competition is open to everyone (internal and external), with internal applicants given priority in the hiring process (with a justification required for an external appointment).
- Assurance of an interview for any internal applicant for a tenurable position, providing they meet the required qualifications in the job advertisement.
- Open competition for all tenurable appointments, in order to maintain the current appointment process and the integrity of the tenure system, including opportunities to enhance scholarship and diversify the nature of the faculty complement, or faculty expertise. In this sense, the Board holds that the pathway is through the openly competitive process, with no automatic or preferential access for current incumbents of existing positions (Senior Lecturer, contract faculty, etc.).

The Taskforce does not support or recommend the “MacEwan model” (i.e., a position that is tenured with the title/rank of assistant professor but which is limited in terms of career progression and compensation).

Senior Lecturer and Tenurable TS Roles.

The Taskforce was also charged with focusing on how the Senior Lecturer and the Tenurable TS role are currently differentiated. During the negotiations that resulted in the creation of the Senior Lecturer position, its differentiation from the TS role was important to both parties and was a primary motivation for including the terms and conditions of employment in Article 6 with the other permanent appointment category (Laboratory Instructor). The following differences were highlighted:

	TS role	Senior Lecturer
Category of appointment	Tenable/Tenured	Probationary/Permanent
Broader context	“Tenure represents a major commitment between the institution and the Employee; Tenure carries with it a significant responsibility for the Employee, including the obligation to continue to perform at a high level of professionalism”	No similar language
Job posting	Open competition	First consideration to internal applicants (during the six-year transition period)
Required academic credential	Normally a doctorate	Master’s
Teaching load	384 SICH	432 SICH

Teaching expectations	Proficient and scholarly	Proficient and scholarly
Service expectations	Per the institutional tenure and promotion criteria, and any criteria for annual review of tenured employees	Limited, focused at the Academic Unit- and Faculty-level
Scholarship expectations	None	None
Probationary period	Five years; intensive Chair and peer evaluations (with up to two years of credit)	Two years; teaching evaluation by the Chair and a peer and an annual peer review (with up to one year of credit)
Criteria for permanency or tenure	As outlined in Article 10.2 and in the institutional tenure criteria	As outlined in Article 6.18.3
Sabbatical leave	Eligible	Ineligible
List A	Eligible	Eligible
Internal grants (not part of Collective Agreement)	Eligible (as PI)	Ineligible (as PI)
Termination provisions	Termination by retirement, resignation, redundancy, dismissal with just cause, or mutual consent	Termination by retirement, resignation, redundancy, dismissal with just cause, or mutual consent

Through the work of the Taskforce, there emerged an interest from the Association in Senior Lecturers having more of the attributes of their tenurable and tenured colleagues (e.g., access to sabbatical or similar leave provisions and internal research grants).

Areas of Consensus and Recommendations.

Appendix J provides both an overview and important context for how the Taskforce navigated the various options generated through an interest-focused discussion. As part of the review of options for consensus, lack of consensus, or further exploration required, the Taskforce reached consensus and agreed on the following recommendations:

The role of Senior Lecturer should be retained

There was no desire to suspend hiring into the role or contemplate its elimination from the Collective Agreement (with current incumbents being transitioned into TS roles). The Senior Lecturer role provides an important opportunity for contract faculty to realize predictability and certainty of employment in a full-time, permanent position.

The “internal first” eligibility window for Senior Lecturer positions should be extended

The MOU “Re. the Creation and Phasing-in of Senior Lecturers” states that during the transition period (to August 14, 2025), all Senior Lecturer positions shall be posted internally first to all limited-term and contract faculty who meet the requirements of Article 4.8.5.2. The Taskforce recommends that this window of eligibility be extended.

Areas without Consensus.

The Taskforce supported the idea of extending the current window for internal posting of Senior Lecturer positions.

However, the parties were unable to reach consensus on any recommendations that would allow Senior Lecturers to move into the TS role or to pathways from the Senior Lecturer to the TS role, beyond those which currently exist in the Collective Agreement.

Association’s Perspective.

The Association had a clear interest in Senior Lecturers having a clearly defined pathway to tenurable positions. The Association believes such pathways are important and appropriate for the following reasons:

- Many Senior Lecturers are qualified for tenurable roles and have already made a long-standing commitment to the University; they should have the opportunity for career progression (i.e., move into a tenurable role) if they meet certain criteria.
- Some Senior Lecturers have the same qualifications, teaching competency and experience, research output (in some cases), and promise as tenurable faculty.
- Since its inception, there has been an evolution of thinking and experience with the Senior Lecturer role. Current incumbents are producing scholarship, wanting to engage in more institutional service, and feeling the pressure of the normal instructional workload. They are experiencing constraints on their potential for career growth.
- Granting the current difference between the categories of TS faculty and permanent faculty (Senior Lecturer and Laboratory Instructor), the Association recognizes that another difference between tenurable faculty and permanent faculty is that the former are selected from a wide pool of applicants, internal as well as external and with different educational requirements.
- The University holds that this process allows the tenured members to choose “the best” candidate among the applicants, and that the “richness” of this applicant pool will not be properly taken advantage of if there is a pathway whereby internal permanent faculty get priority over external candidates.
- The Association notes that given the lack of career advancement opportunities for permanent faculty, such as sabbatical leaves or access to internal grants, it is increasingly difficult for permanent faculty with a heavy teaching load to improve their CV to be able to compete for tenurable positions with external “best” candidates.

- At the very least, the Association advocates for mechanisms such as banking to provide time for upgrading their CVs while teaching a heavier load.
- There needs to be more guidance about the standards required to achieve permanency and better articulation of opportunities and expectations about service for Senior Lecturers and Laboratory Instructors.
- The Association notes that in 2021 the Academic Standards Committee recommended to GFC and the Office of the Provost that there should be a Handbook for *Permanent Employees* to parallel *The Tenure and Promotion Handbook*. The Taskforce endorses this recommendation and notes that work is underway elsewhere towards this end.

Board's Perspective.

The Board expressed no interest in Senior Lecturers having a clear pathway to tenurable positions. Among the reasons for this were the following:

- The Senior Lecturer position was created after reviewing many scenarios and options, with the goal of providing greater stability and predictability of employment for contract faculty. It was not created to be a stepping stone or pathway to a tenurable position; it was created as a specific, permanent category of employment in its own right and is intentionally distinguished from the tenurable TS role.
- Open competition for all tenurable appointments is important in order to maintain the integrity of the tenure system, including opportunities to enhance scholarship and diversify the nature of the faculty complement, or faculty expertise.
- A more clearly defined pathway may disincentivize creation of Senior Lecturer positions, thereby diminishing opportunities for contract faculty to realize predictability and certainty of employment.
- Concerns about the budget implications, arising from the cost differential between Senior Lecturer and TS/TSS faculty appointments.

The lack of a clear consensus on pathways in many ways demonstrates the challenging nature of the conversation. This should not be a surprise, since the Taskforce found no clear precedent for the type of enhanced pathways that were envisioned as potential options going forward. Some post-secondary institutions have bargained provisions that fall short of tenure but still offer contract faculty certainty and predictability, and the institution stability. In this regard, the Senior Lecturer role is one such example of the manifestation of this approach.

Reconciling Perspectives.

In the absence of consensus on a more clearly defined pathway to tenure, the Taskforce reviewed options that might serve to make Senior Lecturers more competitive for other positions. These options include:

- Improving professional and career development opportunities for those who wish to realize success in applying for a tenurable position were highlighted.
- Access to professional/sabbatical leaves.

- Support for preparing a tenure track application.

The Taskforce, however, was unable to reach consensus on these topics and no recommendations are therefore provided.

CONCLUSIONS AND NEXT STEPS.

The Taskforce worked well together, taking an interest-focussed approach to explore issues and to identify options to resolve them. In this process, the Taskforce has identified some important areas of consensus including those related to:

- How workload is assigned.
- The measurement of faculty works as well as some common interests regarding the need to address the workload of tenurable faculty.
- Maintaining work patterns.
- A common understanding of “pathways” for contract faculty.
- Retaining the Senior Lecturer position.
- Extending the preference to internal contract faculty in applying for Senior Lecturer positions.

The full summary of recommendations can be found in Appendix M. Finding these areas of consensus should support a more focused approach to bargaining. That said, there are areas where clear differences remain, including:

- Whether faculty workload volume is a general problem for all full-time faculty or a problem that affects some faculty.
- The eligibility of permanent faculty for professional leaves/sabbaticals.
- The creation of clear pathways for Senior Lecturers to tenurable positions.

In these areas, the Taskforce believes that laying out the different perspectives related to these issues should assist collective bargaining as the Parties explore possible solutions.

The Taskforce’s final report will be conveyed to the Provost and Vice-President Academic and to the President of the Association. We anticipate that they will share the report with the respective bargaining teams for their review.

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Appendix A

MOU Regarding a Taskforce to Review Full-time Faculty Workload and Appointment Categories

Green Sheet #55

Language as Revised

MEMORANDUM OF UNDERSTANDING

between

THE BOARD OF GOVERNORS OF MOUNT ROYAL UNIVERSITY
("The Board")

and

THE MOUNT ROYAL FACULTY ASSOCIATION
("The Association")

Regarding a taskforce to review full-time faculty workload and appointment categories

During bargaining, the parties have discussed a broad range of issues related to full-time faculty workload. These have included workload volume, workload distribution across areas of faculty responsibility (i.e., teaching, service, and scholarship), workload distribution across employees, workload measures, and support for research and scholarship. The Association has also raised the appointment categories of Senior Lecturer and the tenurable TS role.

In order to further discussions, the parties commit to striking a taskforce to explore and review these items.

The review will consider the broad parameters guiding full-time faculty workload, in relation to the way they are currently articulated in the Collective Agreement. Aspects to be examined that have potential to affect faculty workload include, but are not limited to:

- The way workload is determined and assigned (consultation between the Chair and the Employees in the Academic Unit, following consultation with the Dean);
- The way workload is measured (assigned SICH, registrants, the Department Average); and
- The way workload can be modified (reassigned time, workload averaging, exceptions approved by the Employee and the Dean, modification to the Department Average, workload appeal).

With respect to the categories of Senior Lecturer and the tenurable TS role, the taskforce shall focus on how these roles are currently differentiated and the pathway to each role.

The taskforce shall comprise six (6) members, three (3) appointed by the Association and three (3) appointed by the Board. The Association and the Board shall each name one (1) alternate to the taskforce. The Board shall provide funding for reassigned time equivalent to 144 SICH for the three (3) members appointed by the Association.

The work of the taskforce shall be supported by a facilitator, selected by mutual agreement of the members of the taskforce. The Board will provide for the cost of the facilitator.

Green Sheet #55

Through this work, the taskforce will create a report which may provide recommendations, including potential changes to the Collective Agreement to be considered in the next round of bargaining, on ways to address the matters identified in this Memorandum of Understanding. The report shall be submitted to the Provost and Vice-President Academic, and the President of the Association, no later than January 15, 2024.

Rationale for Change

The reasons for this change are as follows:

- As per the mediator's recommendation of February 11, 2022.



Jonathan Withey
Chair, Negotiating Committee
Board of Governors



Kirk Niergarth
Chair, Negotiating Committee
Mount Royal Faculty Association

13 February, 2022
Date

Appendix B

Workload Taskforce Community Agreement

On September 28, 2023, the taskforce worked with Facilitator Lyle Kanee to arrive at the following agreements:

Relationship of Taskforce Discussions and Collective Agreement Negotiations

The Taskforce does not have a mandate to amend the Collective Agreement. Its mandate is limited to exploring the issues identified in the MOU (Taskforce to Review Full-time Faculty Workload and Appointment Categories), creating a report and possibly making recommendations including recommendations for potential changes to the Collective Agreement. The Report is issued to the Provost and Vice-President Academic and the President of the Association. The discussions within the Taskforce are strictly without prejudice to collective bargaining negotiations.

Role of the Facilitator

The Facilitator assists the progress of discussions among Taskforce participants; monitors progress towards the agreed upon schedule; is available for conference calls or meetings at the request of participants; any other responsibilities assigned.

Record of Discussion

A progress record will be prepared by a designated recorder during each meeting and reviewed for consensus by those in attendance. The record is not intended as minutes. The goal is to capture the progress made in the discussions: action items, decisions, conclusions, etc. and to provide some context for each. The progress records may be an aid to preparation of the final report but will not be circulated beyond the Taskforce participants. (Evan has volunteered to serve as recorder of meetings he attends.)

Communications

The participants will, from time to time, develop and issue joint communications to their constituents regarding the progress of Taskforce discussions. These communications are not to reveal the substance of their discussions.

It is expected there may be times when the Taskforce will decide to seek input from external parties, including faculty members or members of the Administration. Those discussions will be held with representation on the Taskforce from both the Association and Administration, unless otherwise agreed.

It is also understood that Taskforce participants from the Association may wish to discuss substantive issues with the Association Executive Board and participants from the Administration may wish to discuss substantive issues with the Provost's or Deans' Council. The substance of those discussions will be treated confidentially; however, there is an

expectation that participants will share the input obtained with other participants of the Taskforce.

Sub-Committees

Sub-committees may be established from among Taskforce participants to undertake certain tasks. There will be no external participants on sub-committees.

Meeting Conduct

- Discussions will be respectful.
- Participants will listen to and seek to understand each other's contribution.
- Language is important.
- Intention does not equal impact.
- "I" statements are encouraged. Avoid attributing to or accusing others.
- Trust is earned, requires risk and takes time. However, the goal is to create a space for free and candid discourse.
- Participation of all members is encouraged.
- Smartphone use will be limited, discrete and respectful.
- Regular breaks will be provided.
- A schedule with markers will be established.
- We all reserve the right to change our mind.

Closure

- When do we close discussion on an issue?
- "We will know when we get there".
- "We may want to park issues and come back to them."
- "If we are stuck, we can call on the Facilitator for help."

Status of Final Report

The Taskforce will work towards a consensus as to what will be included in its report, which may include recommendations for which there is a consensus, majority support or minority support. There will be one report.

Appendix C

Taskforce Membership

Association Representatives	Board Representatives
Brenda Lang, Fixed-Term Instructor, General Management & Human Resources	Evan Cortens, Dean of Continuing Education & Extension (formerly Director, Institutional Research & Planning)
Gülberk Koç Maclean, Senior Lecturer, Department of Humanities	Jennifer Pettit, Dean of Arts
Lee Easton, Professor, Department of English, Languages & Cultures	Jonathan Withey, Dean of Science & Technology
Patricia Kostouros, Professor and Chair, Child Studies & Social Work	Kelly Williams-Whitt, Dean of Business & Communication Studies

Taskforce Meetings Dates

2022-2023	2023-2024
May 31, 2022	January 9, 2023
September 6, 2022	January 30, 2023
September 28, 2022 (full day) with L. Kanee	February 13, 2023
September 29, 2022 (full day) with L. Kanee	March 2, 2023
October 17, 2022	March 21, 2023
November 21, 2022	April 6, 2023
November 28, 2022	May 4, 2023
December 9, 2022	May 18, 2023
	June 8, 2023
	September 18, 2023
	January 9, 2023

Appendix D

Themed Potential Solutions to Faculty Workload

A1. Determination: Establish Expectations

A. Determination	B. Amount/Quantity	C. Modification	D. System or CA Change
1. Establish expectations	1. Establish expectations	1. Establish expectations	1. Work pattern No desire to tackle this or make changes at this time
2. Transparency	2. Flexible work plans	2. Flexible work plans	2. SICH No desire to tackle this or make changes at this time
	3. Level the field		3. Admin
			4. Other

A2. Determination: transparency

Topic	No Consensus	Consensus	Explore
Establish a taskforce to look at and estimate how much time is required for those commitments. That would be a published and available list for deans, chairs and all faculty. For instance, new faculty might not have any idea of the commitment. List revisited annually? R A1			
List A/Coordination Faculties could publish a list of priorities for these pools of reassigned time funding for the year. R A1			
Thinking about how sabbaticals work for instance (the SLC) there could be some sort of committee system			

evaluating these plans? R A1			
Importance to have transparency in the allocation of reassigned time, research projects, etc.			Communicate more about List A what's available
Extending/(Promoting?) the collegial process for the assignment of instruction and service. ns.			Explore more Chairs Assembly?
Look at current reassigned time provisions and how they might be repurposed or reprioritized. Potentially addresses transparency. Repeat			
Eliminate all reassigned time pools and fold it into the current process of collegial workload assignment. Repeat see above			
Some people don't apply [for List A for scholarship] because they don't think they will get it. Need better consultation processes around work. The conversation with the chair isn't happening consistently.			More communication about List A
A cultural challenge around "people looking over the fence."			Build transparency as much as possible
Elimination of List A, coordination, or even sabbaticals, in a budget neutral way (distributing the funds out to units/faculties/etc), and manage through the collegial process R A1/D4			

B1. Amount/Quantity: Establish expectations

Topic	No Consensus	Consensus	Explore
A need to stop talking in terms of course releases and instead talk about work proportion.			
Thinking about a day, e.g., one day per week, 20% of the week, and we talk about the proportion of your work, over a three-year period, say, that would be under each of the usual activity areas (teaching, service, scholarship).			Explore with relation to annual report and banking and department average registrant counts
Think about ways to better define expectations across all components of work. Recognize what can contribute to volume.		X	
Criteria for reassigned time, not just based on dollars. R A1			

B2. Amount/Quantity: Flexible workplan

Topic	No Consensus	Consensus	Explore
So for a chair, for instance, the service proportion would be much higher.			Link to proportion of work
Someone who wants to do research could have some portion of their time there.			Link to longer term work plan
Thought that service is easier to measure, potentially. Could look at operation committees of the university, the GFC committees, etc. on an ongoing basis.		X to recommend to University	

Faculty members can choose committees and then estimate.			Working Group
Outside MRU commitments the faculty member would need to estimate.			Working Group
We like proactive statements in the CA. They can be helpful to shift behaviour/expectations. "Recognizing that the distribution of responsibilities can vary from one individual to another and over time." Can create a lens through which to read language.		X	
Additional workload formulas beyond the Department Average. More prescriptive in quantifying full scope of workload.		X	
Putting Department Average front and centre, and focusing on the ranges rather than "normal" centre point.			Explore Chairs Assembly and Deans
Less teaching for new tenurable/permanent faculty hires			Explore
Differential distribution of teaching SICH within an academic unit, within ranges and departmental average respecting total workload in a collegial process R A1/D2			

B3. Amount/Quantity: level the field

Topic	No Consensus	Consensus	Explore
Starting at zero rather than 100. Instead of		X	

<p>“reducing” workload, you build it up.</p>			
<p>Work is work, period. You come up with a work plan (as opposed to a teaching plan/service plan/scholarship plan, etc)</p>			<p>Explore</p>
<p>What is a unit of work? If we’re asking someone to come up with a work plan, what is a unit of work? SICH Equivalent How much time will it take to serve on a committee? But you don’t just walk into a classroom, you have to prep, you have to do assessment, not all courses are the same. SICH is presently based on time in the classroom. Multiple choice exams take less time to grade than essays.</p>			<p>Explore</p> <p>Can’t do differentiate without providing more ‘play’ i.e. ranges Pilot project?</p>
<p>A workload rubric No formula</p>			<p>Three-year plan</p>
<p>Equity on contract faculty. The focus here is on full-time faculty, but there are impacts on contract faculty. On going lens.</p>			
<p>Recognition of the need to maintain currency. Unless you have a course reassigned time for a large project, this is just built into your workload.</p> <ul style="list-style-type: none"> We’re all supposed to do scholarship/teaching informed by scholarship. So you may be doing 			

scholarship but not as part of your assigned workload.			
When we moved to scholarly teaching at MRU, we didn't think through the impact for folks who do not have scholarship as part of their workload (e.g., contract faculty).			
Recognize differential workload impact of different delivery modes. (studio, on-line, clinical, lab, team teaching)			Explore
Need to continue to recognize coordinating and advising as a valued activity.			Explore
Recognition of the different workload associated with different courses. See above			

C1. Modifications: establish expectations

Topic	No Consensus	Consensus	Explore
Some ability for that conversation to happen between faculty member, chair and dean. For instance, over the next three years, looking at grants, projects, etc, putting together a three-year plan. And an opportunity to revisit should things change. <ul style="list-style-type: none"> The Arts scholarship criteria, for instance, already has this - Tenure and Promotion Criteria. 			X

For research, could establish minimum expectations for what research productivity might look like over, say, 3 to 5 years. Could create a list of things considered research activities. Over that period, you're expected to produce a number of things from each list, for instance.			X Link to longer-term workload planning/reporting.
"Teaching as punishment" is problematic. What if when someone doesn't meet a scholarship obligation, they have to pay the reassigned time money back?			X
Workload considerations for specific groups, e.g., tenurable, TSS, certain career stages (e.g., service and changing nature through seniority).			X
Scholarship plans wasn't sure what this is in relation to since we already do scholarship plans			
Examination of service commitments at MRU			X (working group as above)

C2. Modifications: flexible workplans

Topic	No Consensus	Consensus	Explore
Scholarship is hard to evaluate annually, given ups and downs, needs to be evaluated over a longer period of time.			X (as above)
There may be, for instance, different pressures doing work in			X (as above)

Indigenous communities.			
But ultimately, for individuals not meeting expectations, without sufficient explanation, there would be adjustments in other components of workload to compensate	X		
Service happens both internally and externally. We need to give credit for external service.			X (working group, as above)
More information about service expectations by type. (Ties into the earlier idea of quantified service obligations.)			X (working group, as above)
Spread work over time more easily (might connect with TS/TSS shifting)			Three-year work plan concept (as above).
Mentorship of colleagues as a recognized service activity; the important of mentorship (especially for new faculty) in understanding and managing workload			Working group

D1. System or CA changes: work patterns

Topic	No Consensus	Consensus	Explore more
Eliminate the concept of TS and TSS. Focus instead on responsibilities and scope of work across a broad range.	X		
Focus on the volume effect of scholarship. What impact scholarship is having on TSS, or all employees, could lead to redefining the expectations of only one			X

work pattern (e.g., TSS only).			
Modify the role of the dean in their ability to influence workload assignment. e.g., workload equity or distribution.			X
Make it easier to switch back and forth between TS and TSS.	X		
Ties into flexibility around time for scholarship, given that the workload might be unevenly distributed over time.			X
SICHification of service and scholarship? But how?			X

D2. System or CA changes: SICH

Topic	No Consensus	Consensus	Explore
Rethink SICH.		X	
Reduce teaching SICH.			X (tentative/interconnected with other ideas)
Unit (or discipline, e.g., Humanities which has many disciplines) average for registrants (similar to department average?). Many think the workload formula is only class hours, but it's actually registrants too. The registrant caps are a function of SICH.			X
Timetable/schedule <ul style="list-style-type: none"> SICH assignments of courses Reduction of total SICH while still meeting student needs 			X (captured above under reducing teaching SICH)

SICHification of service and scholarship? But how? R D1			X (working group consideration)
Differential distribution of teaching SICH within an academic unit, within ranges and departmental average respecting total workload in a collegial process R A 1/B2		X	

D3. System or CA changes: admin

Topic	No Consensus	Consensus	Explore
“The tail is wagging the dog around here.” Admissions, for instance. Cohort programs can get oversubscribed. We can’t have a cap. We don’t control that. Want to have some conversations about who is controlling what.			X in relation to other measures.
Reducing total institutional service requirement. <i>No institutional service requirement</i>			X potentially working group, if analysis is on service burden
Introduce minimums for registrants.			X
Chair workload. They do many things that are “administrative” in nature and their skillset isn’t maybe required for. Their time might be better spent elsewhere. <ul style="list-style-type: none"> Last review of the chair was about ten years ago. Recognizing the scope of the chair role as a member of the Association. 			X

D4. System or CA changes: other

Topic	No Consensus	Consensus	Explore
Budget. What is the possibility of a rolling budget? For instance, if List A isn't used in one year, it could carry over into the next year. Non-profits do this. Rather than an annual budget, we plan a rolling budget over a period of time.			X link to longer range workload analysis/discussion
Creative ways to reduce workload volume: across the board reduction vs proportional reduction in Department Average.			X
Increase reassigned time generally, or for specific functions. (E.g., increase List A or other budgets)			X interconnected with broader discussions about volume and timeframe for workload determination
More full-time faculty. This would reduce the amount of work done by individuals in high service units.			X
Decrease the number of meetings and committees. Target mission critical things.			X service working group
Increase List A, perhaps a formula tied to growth (e.g., tied to size of faculty complement)			X interconnected with broader discussions about volume and timeframe for workload determination
A planned scholarship system with resources in place and expectations of deliverables.			X three-year workplan/reporting, etc.
Better way to assess quality and quantity of online teaching.			X review assumptions about SICH/SICH definition
External funding for reassigned time?			

<p>(Grants, community partners, etc) <i>already in CA</i></p>			
<p>Elimination of List A, coordination, or even sabbaticals, in a budget neutral way (distributing the funds out to units/faculties/etc), and manage through the collegial process R A1/A2</p>			

Appendix E

Average Class Size by Year

Term	Avg Class Size*
Fall 2012	28.4
Fall 2013	29.6
Fall 2014	28.0
Fall 2015	29.6
Fall 2016	29.5
Fall 2017	30.5
Fall 2018	31.6
Fall 2019	31.4
Fall 2020	33.0
Fall 2021	32.6
Fall 2022	31.6
Average	30.5

*As of the add/drop deadline, 3-credit lectures only, Fall terms only (this replicates the approach to institutional reporting on class size data)

Appendix F

Full-time Faculty with Previous Contract Appointments

Full Time Start Year	# No Previous Contract	# Yes Previous Contract	% Previous Contract	Average %
1997	23	0	0%	0%
1998	3	3	50%	50%
1999	1	1	50%	50%
2000	3	2	40%	40%
2001	8	1	11%	11%
2002	7	9	56%	56%
2003	5	4	44%	44%
2004	4	1	20%	20%
2005	5	10	67%	67%
2006	7	3	30%	30%
2007	8	11	58%	58%
2008	15	5	25%	25%
2009	21	16	43%	43%
2010	15	2	12%	12%
2011	10	6	38%	38%
2012	14	9	39%	39%
2013	6	3	33%	33%
2014	4	3	43%	43%
2015	2	6	75%	75%
2016	9	6	40%	40%
2017	3	9	75%	75%
2018	10	10	50%	50%
2019	11	9	45%	45%
2020	5	3	38%	38%
2021	8	6	43%	43%
2022	35	27	44%	44%
2023	18	12	40%	40%
Average				41%

NOTE: Employment records in Banner only go back to 1997, meaning that the earlier the start date for the current FT position, the more likely it is there is possible previous contract teaching not captured in Banner.

Appendix G

Full-time and Contract Faculty Teaching (2021/22)

SICH and sections by course type

Course Type	Full-Time			Contract		
	# Sections	SICH	% SICH	# Sections	SICH	% SICH
Cln	23	1,726	7.3%	292	41,179	92.7%
Lab	252	8,975	39.0%	394	12,135	61.0%
Lec	1,809	72,106	48.1%	1,955	86,262	51.9%
All	2,084	82,807	44.1%	2,641	139,576	55.9%

Avg SICH and sections by faculty type

Category	Pattern	# Faculty	All		Lecture		Lab		Clinical	
			# Sections	SICH	# Sections	SICH	# Sections	SICH	# Sections	SICH
Contract		521	5.1	267.9	3.8	165.6	0.8	23.3	0.6	79.0
Full-Time	Lab	10	13.5	573.7	0.2	4.0	13.3	569.7	-	-
Full-Time	SL	10	9.1	397.2	8.6	384.4	0.5	12.8	-	-
Full-Time	TS	83	7.8	302.9	7.1	277.1	0.6	15.8	0.1	10.1
Full-Time	TSS	243	5.5	219.7	5.2	207.1	0.3	8.3	0.1	4.3

Appendix H

Registrants by Employment Status and Pattern

Academic Year	Employment Status	Pattern	# Faculty	Min	25%	Mean	Median	75%	Max	SD
2018-19	Asst/Assoc/Prof	TS	87	0.0	104.0	203.0	198.0	282.0	632.0	138.9
2018-19	Asst/Assoc/Prof	TSS	272	0.0	53.0	123.8	123.0	186.0	366.0	86.4
2018-19	Contract-Continuing		34	40.0	114.3	230.2	242.5	336.0	443.0	124.2
2018-19	Contract-Fixed Term		25	132.0	276.0	316.8	323.0	394.0	604.0	108.6
2018-19	Contract-Sessional		455	0.0	31.0	113.4	74.0	169.5	745.0	113.3
2018-19	Lab Instructor		9	129.0	201.0	224.1	230.0	243.0	328.0	54.1
2019-20	Asst/Assoc/Prof	TS	94	0.0	112.3	196.7	169.5	272.0	671.0	145.7
2019-20	Asst/Assoc/Prof	TSS	275	0.0	61.0	127.8	129.0	179.5	522.0	86.9
2019-20	Contract-Continuing		32	26.0	116.8	232.8	253.0	321.3	531.0	132.9
2019-20	Contract-Fixed Term		23	115.0	227.0	304.7	328.0	375.0	531.0	116.8
2019-20	Contract-Sessional		421	0.0	33.0	123.4	81.0	168.0	820.0	121.6
2019-20	Lab Instructor		10	88.0	164.8	194.2	200.0	217.5	326.0	64.5
2019-20	Senior Lecturer		4	318.0	318.8	332.5	320.0	333.8	372.0	26.4
2020-21	Asst/Assoc/Prof	TS	93	0.0	113.0	195.3	188.0	268.0	558.0	122.8
2020-21	Asst/Assoc/Prof	TSS	267	0.0	68.5	131.1	136.0	191.5	416.0	87.6
2020-21	Contract-Continuing		27	0.0	124.0	233.3	217.0	348.0	530.0	155.5
2020-21	Contract-Fixed Term		16	107.0	254.3	341.0	378.5	402.8	491.0	106.9
2020-21	Contract-Sessional		444	0.0	34.8	131.2	88.5	189.8	773.0	127.7
2020-21	Lab Instructor		10	60.0	138.5	182.2	178.5	206.0	337.0	76.8
2020-21	Senior Lecturer		8	230.0	286.0	334.0	320.0	379.3	469.0	77.6
2021-22	Asst/Assoc/Prof	TS	92	0.0	102.0	184.1	184.0	263.3	504.0	117.8
2021-22	Asst/Assoc/Prof	TSS	266	0.0	51.5	123.4	123.5	183.8	421.0	88.8
2021-22	Contract-Continuing		38	0.0	43.0	177.5	105.5	295.0	666.0	163.7
2021-22	Contract-Fixed Term		16	0.0	235.3	287.1	310.5	355.0	501.0	118.5
2021-22	Contract-Sessional		467	0.0	30.5	123.5	77.0	180.5	871.0	126.2
2021-22	Lab Instructor		10	103.0	156.8	198.3	208.5	214.0	325.0	62.0
2021-22	Senior Lecturer		10	192.0	252.8	295.0	282.0	332.0	456.0	83.0
2022-23	Asst/Assoc/Prof	TS	98	0.0	96.5	177.9	175.0	270.3	482.0	123.0
2022-23	Asst/Assoc/Prof	TSS	292	0.0	61.8	125.7	128.0	180.0	362.0	85.5
2022-23	Contract-Continuing		51	0.0	61.0	215.9	201.0	329.0	549.0	157.4
2022-23	Contract-Fixed Term		13	0.0	139.0	254.1	272.0	355.0	515.0	173.0
2022-23	Contract-Sessional		420	0.0	32.0	120.8	69.5	165.0	784.0	130.2
2022-23	Lab Instructor		9	39.0	176.0	191.4	211.0	215.0	315.0	73.1
2022-23	Senior Lecturer		14	0.0	270.0	308.6	326.5	357.8	508.0	113.1

Appendix I

Ontario Standard Workload Formula and Guidelines for Using

From the Ontario College of Applied Arts & Technology Employee's Collective Agreement

Article 11 WORKLOAD

11.01 A Each teacher shall have a workload that adheres to the provisions of this Article.

11.01 B 1 Total workload assigned and attributed by the College to a teacher shall not exceed 44 hours in any week for up to 36 weeks in which there are teaching contact hours for teachers in post-secondary programs and for up to 38 weeks in which there are teaching contact hours in the case of teachers not in post-secondary programs.

The balance of the academic year shall be reserved for complementary functions and professional development.

Workload factors to be considered are:

- (i) teaching contact hours
- (ii) attributed hours for preparation
- (iii) attributed hours for evaluation and feedback
- (iv) attributed hours for complementary function

11.01 B 2 A "teaching contact hour" is a College scheduled teaching hour assigned to the teacher by the College. Regardless of the delivery mode, courses shall be deemed to have the same number of teaching contact hours as they would if taught entirely in the classroom or laboratory.

11.01 C Each teaching contact hour shall be assigned as a 50 minute block plus a break of up to ten minutes.

The voluntary extension of the teaching contact hour beyond 50 minutes by the teacher and any student(s) by not taking breaks or by re-arranging breaks or by the teacher staying after the period to consult with any student(s) shall not constitute an additional teaching contact hour.

11.01 D 1 Weekly hours for preparation shall be attributed to the teacher in accordance with the following formula:

TYPE OF COURSE	RATIO OF ASSIGNED TEACHING CONTACT HOURS TO ATTRIBUTED HOURS FOR PREPARATION
New	1 : 1.10
Established A	1 : 0.85
Established B	1 : 0.60
Repeat A	1 : 0.45
Repeat B	1 : 0.35
Special A	as indicated below
Special B	as indicated below

11.01 D 2 No more than four different course preparations shall be assigned to a teacher in a given week except by voluntary agreement which shall not be unreasonably withheld.

11.01 D 3 For purposes of the formula:

- (i) "New" refers to the first section of a course which the teacher is
 - teaching for the first time. (This definition does not apply to a new full-time teacher who has previously taught the course as a Partial-Load, Sessional or Part-time employee, nor to courses designated as "Special" as defined below); or
 - teaching for the first time since a major revision of the course or curriculum has been approved by the College.
- (ii) "Established A" refers to the first section of a course which the teacher has previously taught but not within the previous three academic years.
- (iii) "Established B" refers to the first section of a course which the teacher has taught within the previous three academic years.
- (iv) Where a non-language course is to be taught in more than one language the first section taught in a second language shall be regarded as "New" or "Established".
- (v) "Repeat A" refers to another section which the teacher is teaching concurrently with the same course for which hours of preparation have been attributed under "New" or "Established", but to students in a different program or year of study.
- (vi) "Repeat B" refers to another section which the teacher is teaching concurrently with the same course for which hours of preparation have been

attributed under "New" or "Established" or "Repeat A" to students in the same program and year of study.

- (vii) "Special A" refers to sections of courses in which students may enter on a continuous intake basis or courses which have been organized into individualized self-learning packages.

The first section of a "Special A" course which the teacher has not taught before or which the teacher has not taught within the previous three academic years attracts the numerical value in "Established A" (1:0.85).

The first section of a "Special A" course which the teacher has taught within the previous three academic years attracts the numerical value in "Established B" (1:0.60).

Repeat sections of a "Special A" course attract the numerical value in "Repeat A" (1:0.45).

- (viii) "Special B" refers to preparation for sections of a course in which the objectives describe the students' application of knowledge in actual work settings.

The first section of a "Special B" course which the teacher has not taught before or which the teacher has not taught within the previous three academic years attracts the numerical value in "Established A" (1:0.85).

The first section of a "Special B" course which the teacher has taught within the previous three academic years attracts the numerical value in "Established B" (1:0.60).

Repeat sections of a "Special B" course attract the numerical value in "Repeat B" (1:0.35).

Additional time necessary to arrange and prepare for student placement in such learning situations shall be attributed on an hour for hour basis and recorded on the Standard Workload Form (SWF), as referred to in 11.02.

- (ix) Hours for curriculum review or course development assigned to a teacher on an ongoing basis, in lieu of teaching or in a non-teaching period, shall be attributed on an hour for hour basis and recorded on the SWF.

11.01 E 1 Weekly hours for evaluation and feedback in a course shall be attributed to a teacher in accordance with the following formula:

RATIO OF ASSIGNED TEACHING CONTACT HOURS
TO ATTRIBUTED HOURS FOR EVALUATION AND FEEDBACK

Essay or project	Routine or Assisted	In-Process
1:0.030 per student	1:0.015 per student	1:0.0092 per student

11.01 E 2 For purposes of the formula:

- (i) "Essay or project evaluation and feedback" is grading:
 - essays
 - essay type assignments or tests
 - projects; or
 - student performance based on behavioral assessments compiled by the teacher outside teaching contact hours.
- (ii) "Routine or assisted evaluation and feedback" is grading by the teacher outside teaching contact hours of short answer tests or other evaluative tools where mechanical marking assistance or marking assistants are provided.
- (iii) "In-process evaluation and feedback" is evaluation performed within the teaching contact hour.
- (iv) Where a course requires more than one type of evaluation and feedback, the teacher and the supervisor shall agree upon a proportionate attribution of hours. If such agreement cannot be reached the College shall apply evaluation factors in the same proportion as the weight attached to each type of evaluation in the final grade for the course.

11.01 E 3 Before the method(s) of evaluation and feedback are established for a course, the supervisor will consult with the affected teachers, as a group. Normally, the group will consist of the teachers working within the affected program. The group may consist of teachers teaching a course that is being taught across programs.

If only one teacher is assigned to a program, that teacher shall be deemed to be "the group" for purposes of this Article.

11.01 E 4 The number of students in a course or section shall be determined initially by the College's planning estimates and recorded on the SWF as provided for in 11.02.

The number of students in a course or section shall be reviewed after the

enrolment audit dates and not later than the completion of the course or section or, at the request of the teacher, following the last day for withdrawal of registration by the student(s), and revised where appropriate.

The number of students in a continuous intake program, course or section shall be reviewed every three months at the request of either the College or the teacher and determined as the weighted average of the number of students formally registered over the duration of the program, course or section. The weighted average shall be calculated by summing the number of formally registered students in each week of the program, course or section and then dividing the sum by the number of weeks in the duration of the program, course or section.

11.01 F 1 Complementary functions appropriate to the professional role of the teacher may be assigned to a teacher by the College. Hours for such functions shall be attributed on an hour for hour basis.

An allowance of a minimum of six hours of the 44-hour maximum weekly total workload shall be attributed as follows:

four hours for routine out-of-class assistance to individual students
two hours for normal administrative tasks.

The teacher shall inform his/her students of availability for out-of-class assistance in keeping with the academic needs of students.

11.01 F 2 The attribution of four hours of out-of-class assistance for students may not be sufficient where a teacher has unusually high numbers of students in his/her total course load. When a teacher who has more than 260 students in his/her total course load considers that he/she will not have sufficient time to provide appropriate levels of out-of-class assistance, the teacher will discuss the issue with his/her supervisor. Possible means of alleviating the concern should be considered such as additional types of assistance being provided or additional hours being attributed. Failing agreement on how to best manage the situation the teacher shall be attributed an additional 0.015 hour for every student in excess of 260.

11.01 G 1 Where preparation, evaluation, feedback to students and complementary functions can be appropriately performed outside the College, scheduling shall be at the discretion of the teacher, subject to the requirement to meet appropriate deadlines established by the College.

11.01 G 2 Where there are atypical circumstances affecting the workload of a teacher or group of teachers which are not adequately reflected in this Article 11, Workload, additional hours shall be attributed, following discussion between each teacher individually and the supervisor, on an hour for hour basis.

SWF Explained

OPSEU - CAAT-A

Academic Local 244

Sheridan College

UNDERSTANDING THE STANDARD WORKLOAD FORM

by Jack Urowitz, President Local 244

It looks like a nauseous physicist's lunch, especially if math is not your hobby. But look more closely. It is your armour, your shield, your shelter, your force field, your fence; and as the poet opined, "Good fences make good neighbours". Or in our case, a good fence keeps management neighbourly. Is it any wonder that our SWF's existence is threatened each time we go to the bargaining table?

Management across the colleges has been eroding the spirit of the SWF by re-interpreting the Prep and Eval factors, and leaving assigned work off the SWF altogether. Faculty workload abuse is proportional to the lack of faculty's scrutiny of their own SWFs. So please take a few minutes and sit down with your SWF and Article 11 in our Collective Agreement – (you can find it at local244.ca) and examine how the numbers relate to your work, and the overall quality of your professional life. The SWF below has a fictional workload using the most common variables.

For questions about your SWF, your assigned workload, please email the Chair of the Workload Monitoring Group, Terry Kostiw, at: terry@local244.ca with the subject line "SWF" - please copy our Office Administrator Linda Martin at: office@local244.ca.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N		
	STANDARD WORKLOAD FORM														Summary of Weekly Totals:	
Check List: A:6-10 Course Code (no more than 4 different Preps)	Preparation				Evaluation Feedback										Rows 14, 15, and 16 are transcribed directly from the Preparation-Evaluation-Feedback Chart, Appendix 1, page 73.	
B:6-10 Class Hours B:11 & 114 Total Teaching Contact Hours	Assigned Teaching Contact Hours	Language of Instruction	Type	Factor	Attr. Hours	Additional Attr. Hours	Class Size	Type	Factor	Attr. Hours	Complementary Hours Allowance	Complementary Hours Assigned	Total		Row 17 - Complementary Hour Allowance has a minimum of 6 hours for every faculty member, taking into account business as usual practices, such as faculty meetings, discussions (like SWF questions) with your manager, etc. These 6 hours are independent of hours for conferences or other weekend activities, such as Open House duties.	
D:6-10 Type of Preparation Required																
E:6-10 Preparation Factors from page 12 of Collective Agreement	Collective Agreement Article 11.01	B&C	D	D	D	D	D	E		E		F		D,F,G		
F:6-10 Attributed Prep. Hours = Teaching Contact Hours X Prep. Factor F:11 & 115 Total Prep. Hours	Course 1	3.00	New	1.10	3.30		40		0.015	1.80					8.10	
H:6-10 Class Size	Course 2	3.00	Est. A	0.85	2.55		40		0.015	1.80					7.35	
J:6-10 Evaluation Factor from page 11 of Collective Agreement	Course 3	3.00	Est. B	0.60	1.80		40		0.015	1.80					6.60	
K:6-10 Attributed Hours = Teaching Contact Hours times Number of Students, times Prep. Factor K:11 & 116 Total	Course 4	3.00	Rep. A	0.45	1.35		40		0.015	1.80					6.15	
	Course 5	3.00	Rep. B	0.35	1.05		40		0.015	1.80					5.85	
	Weekly Totals	15.00			10.05	0.00				9.00	0.00	0.00			34.05	
	Preparation Hours / Subject = Factor X Teaching Contact Hours														Evaluation Feedback Hours / Subject = Factor X Class Size X Teaching Contact Hours	
	Summary of Weekly Totals															
	Assigned Teaching Contact Hours / week								15.00							
	Preparation Hours / week								10.05							
	Evaluation Feedback Hours / week								9.00							
	Complementary Hours (allowance) / week (Minimum 6)								6.00							
	Complementary Hours (assigned) / week															
	Total this period SWF								40.05							

Articles to Keep In Mind

11.02 A 1 (a) Prior to the establishment of a total workload for any teacher the supervisor shall discuss the proposed workload with the teacher and complete the SWF –

Have you had the meeting with your Associate Dean? Your Coordinator is not your supervisor.

11.02 A 3 Following receipt of the SWF, the teacher shall indicate in writing on the SWF whether in agreement with the total workload. If not in agreement the teacher and the supervisor may add such other comments as is considered appropriate and may indicate in writing that the workload should be reviewed by the College WMG.

So, if you want changes made, make an effort to meet again with your A.D. before the deadline mentioned below.

11.02 A 4 In the event that the teacher is not in agreement with the total workload and wishes it to be reviewed by the WMG, the teacher must so indicate in writing to the supervisor within five working days from date of receipt of the SWF.

Note, if you do not sign your SWF it will be considered accepted by you after 5 working days.

Appendix J

Chart of Potential Solutions to Faculty Appointments and Pathways

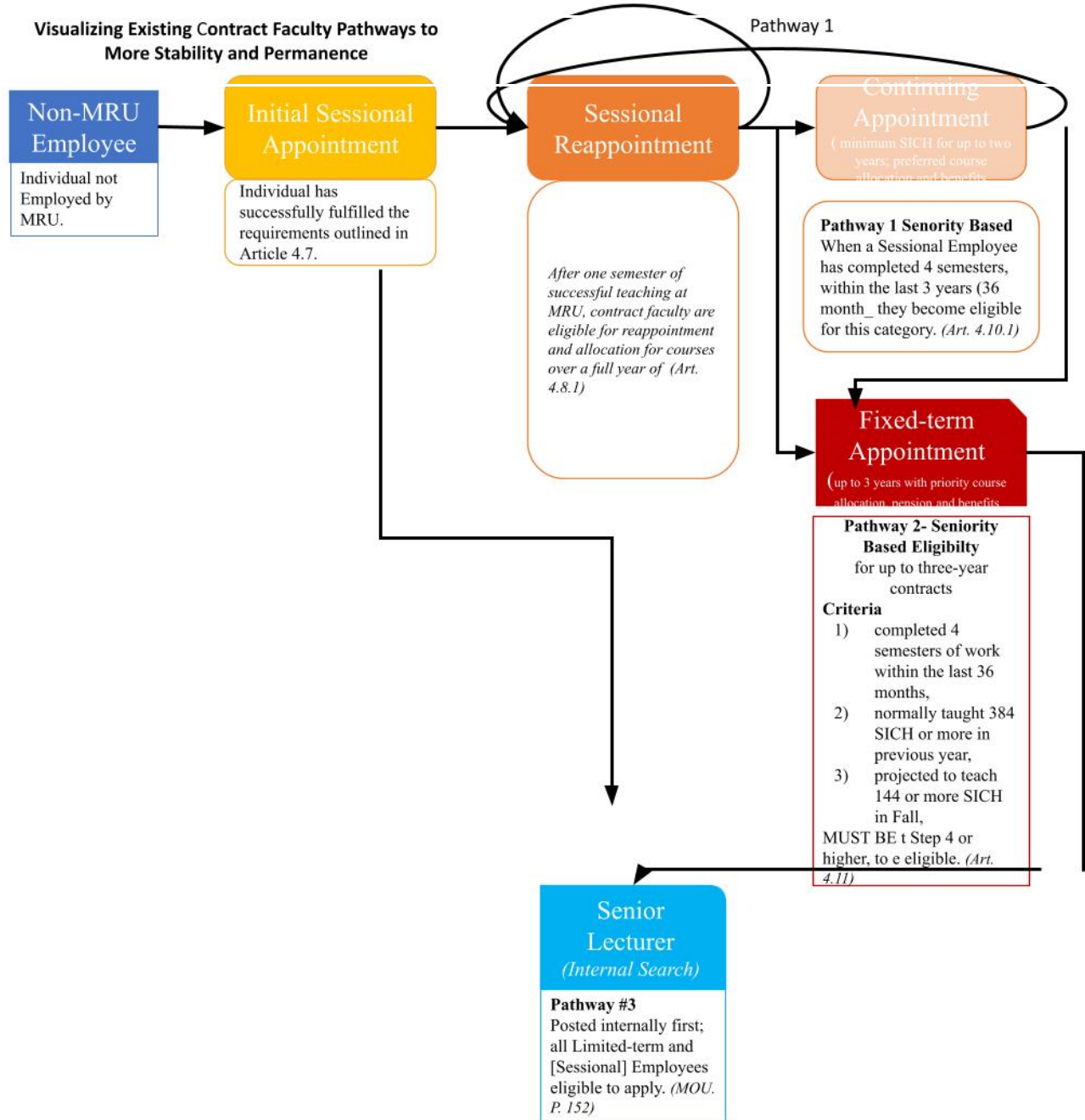
Topic	No Consensus	Consensus	Explore
Motivation for creating a pathway	<p>X</p> <p>MRFA: 1. Qualified SLs of long-standing commitment to MRU should have the opportunity for career progression (become eligible to move to tenurable roles if they meet certain criteria). 2. SLs who are eligible, after satisfaction of specified criteria, have the same academic qualifications, teaching competence and experience, and in some cases same amount of research output and promise as tenurable faculty.</p> <p>Admin: 1. If an SL has a pathway to a tenurable role, this might discourage departments from hiring contract faculty into SL roles. 2. The provincial budget may not allow. 3. SL is not the best candidate MRU can get for a tenurable role since their initial appointment was not through an open competition.</p>		
Differences between the SL and the TS roles: Evaluation	<p>Admin: SL is not selected through an open - competition (but can apply), whereas TS is.</p> <p>MRFA: Agreed. But they offer the same quality and quantity (even more) of work.</p>		
Keep the SL position (do not eliminate all SL positions and turn them into TS positions); it's important that contract faculty have the		X	

eligibility to apply for permanent positions.			
Eligibility for contract faculty to apply for an SL position, where internal candidates are given the priority in hiring decision, should be maintained		X	
- Regularization, understood as an automatic conversion of an SL to a tenurable role is not desirable. Reason: Not everyone may meet the requirements for a tenurable role. Time served is not sufficient.		X	
- Provide specific employment development opportunities, such as access to internal grants, eligibility for sabbatical, in order to help SLs to prepare for open competition job ads.			X Admin: Objection unclear. MRFA: Opportunities for career development are important for our members. SL was modeled on the Instructorship when MRU was a college, at which time instructors had professional leaves (where “a professional leave”, is substantially the same as a “sabbatical leave”, which is a term reserved for tenurable roles).
Think of ways to make SL more attractive if an SL is not eligible to apply for a tenurable role.		X But Admin did not agree to a specific proposal.	
Provide opportunities for SL to become competitive for tenurable jobs	X Admin: potential existed if leaves approved. MRFA: Our members should not be frozen in their career at MRU, we should support them to become competitive in applying for tenurable positions.		

<p>Change in grid placement linking compensation to years of service</p>			
<p>Internally post for tenurable positions as a pathway for SL Prioritize SLs Need to justify external hiring</p>			<p>X MRFA's proposal. Admin's position unclear.</p>

Appendix K

Existing Pathways for Contract Faculty at Mount Royal University



Appendix L Access and Inclusion Quick Facts

Access and Inclusion Services partners with Mount Royal faculty to provide students with reasonable academic accommodations. Services are tailored to meet each student’s academic needs.

Access and Inclusion Services provides academic accommodations to students with documented disabilities including mobility/sensory/learning and mental health, as well as for protected grounds within Human Rights legislation.

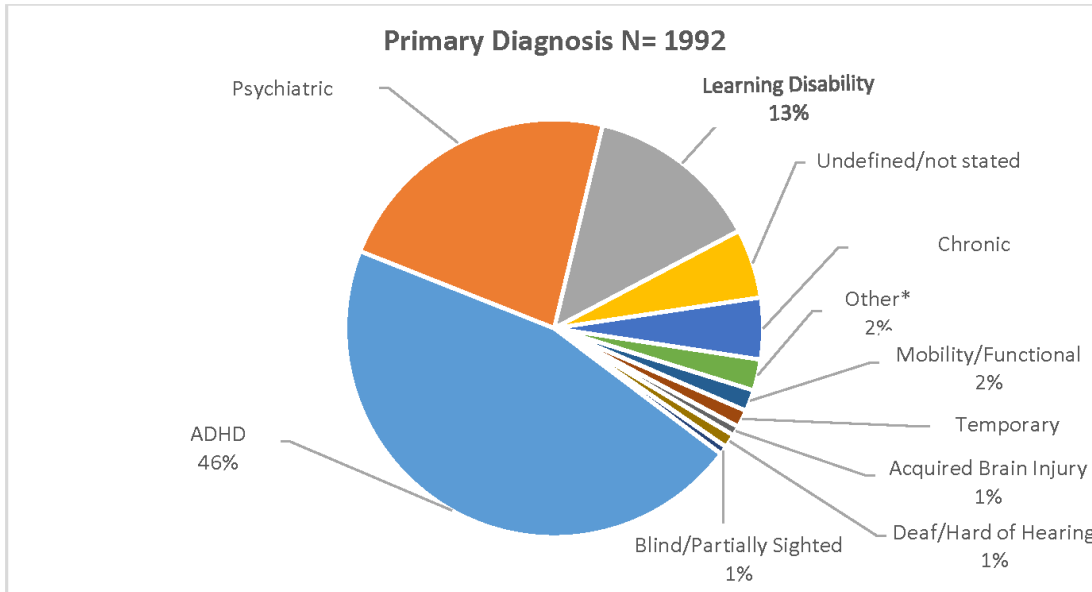
Student numbers:

Year	2018-19	2019-20	2020-2021	2021-2022	2022-2023
# of students registered	1261	1348 (+7%)	1496 (+11%) Included other protected grounds)	1888 (+26%)	1992 (+5%)

Breakdown by type of documented primary disability (as defined by the funder):

Student primary diagnosis		
Diagnosis	Number of students	%
ADHD	912	46
Psychiatric	453	23
Learning Disability	270	13
Undefined/not stated – (may be a protected ground other than disability)	107	5
Chronic Medical/Systemic	95	5
Other*	51	2
Mobility/Functional	33	2
Temporary	27	1
Acquired Brain Injury	15	1
Deaf/Hard of Hearing	21	1
Blind/Partially Sighted	13	1
Total	1992	100%

*Other includes students registered with Accessibility Services who have a diagnosis of a temporary disability (broken arm, concussion, etc.), Mild intellectual disability, Communication disorder or Fetal Alcohol Spectrum; underwent screening; were without a confirmed disability due to pending documentation; requested accommodation based on a protected ground other than disability, or who were confirmed not to have a disability, but sought advice from an Access Advisor.



Accommodated exam Information

	2018-19	2019-20	2020-2021	2021-2022	2022-2023
Number of Accommodated Exams completed	7876	6454 *reduced due to covid cancellations	Due to covid the exam centre was closed	5290	8649 (10451 exam seating requests)
Number of exams requested					9630
Number of students using exam service	766	900	0	1038	1246
Number of faculty served	633	600	0	694	500
Number of courses exams provided for	1406	1353	0	954	1214

Appendix M

Summary of Recommendations

Full-time Faculty Workload

With respect to the way workload is determined and assigned (consultation between the Chair and the Employees in the Academic Unit, following consultation with the Dean) and the way that workload is measured (assigned SICH, registrants, the Department Average):

Recommendation 1

The Taskforce strongly recommends that Mount Royal collect key demographic data from its employees to better address equity issues in faculty workloads.

Recommendation 2

The approach articulated in Article 14.1 continues to work well. No changes are recommended to this provision.

Recommendation 3

Having reviewed alternatives to Scheduled instructional Contact Hour (SICH), it is recommended that SICH remain the measurement of instructional load in the Collective Agreement.

Recommendation 4

The current definition of SICH in the Collective Agreement be replaced with one that more clearly outlines the components of SICH: 1 SICH (including, among other factors, class preparation, student assessment, and student contact) multiplied by the number of weeks of instruction (currently agreed to be 16 weeks in Fall and Winter semesters) multiplied by the number of instructional hours (usually 3 per week but can vary).

Recommendation 5

Having reviewed the Ontario's Colleges of Applied Arts and Technology's Standard Workload Formula, it is recommended not to move to such a detailed formula to calculate faculty workload.

Recommendation 6

The TS and TSS work patterns should remain.

Recommendation 7

Expectations related to service commitments should be examined.

Recommendation 8

Efforts should also be made to improve the culture of meetings at the University.

Recommendation 9

Workload considerations for faculty early in the tenurable period should be examined.

Recommendation 10

Existing options in the Collective Agreement that intersect workload volume and workload distribution/flexibility should be more clearly and proactively communicated.

Recommendation 11

Resourcing for core academic supports at the University should be examined, with a view to increasing their efficacy.

Faculty Appointments, and the TS Work Pattern and Senior Lecturer**Recommendation 12**

The service opportunities available to Senior Lecturers, as well as the accompanying service expectations, should be clarified in the Collective Agreement.

Recommendation 13

Service expectations of the Senior Lecturer role be clarified with Department Chairs and/or through updates to University-level resources (e.g. a handbook).

Recommendation 14

The definition of Laboratory Instructor L1/L2 should be reviewed to ensure it reflects the employees' status as full-time faculty members.

Recommendation 15

Full-time Laboratory Instructors should inventory their current responsibilities and make this information available to the bargaining teams.

Recommendation 16

The term "regularization" can be understood as an automatic conversion of a Senior Lecturer to a tenurable role after a specified time.

Recommendation 17

The term "pathways" can be understood to refer to a deliberate and intentional bias towards particular groups (e.g. current contract faculty) to progress to another category and that such pathways have signposts along the way.

Recommendation 18

A position that is tenured with the title/rank of assistant professor title but which is limited in terms of career progression and compensation ("The MacEwan model") not be adapted to Mount Royal.

Recommendation 19

The role of Senior Lecturer should be retained.

Recommended 20

The "internal first" eligibility window for Senior Lecturer positions should be extended.

