

# IMPLEMENTING A New Faculty Workload Formula

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**E**VEN IN THE FACE OF THE CURRENT NURSING SHORTAGE, nursing education programs are turning away qualified students because of inadequate numbers of nurse faculty. The severe shortage of nurse faculty has led to changes in faculty mix. Increased numbers of faculty are working part-time, and increased numbers of faculty who are prepared at the master's level are working full-time. • At our college of nursing, changes in teaching responsibilities for different types of faculty resulted in the decision to examine faculty workload. Faculty prepared at the master's level were primarily teaching clinical courses and large didactic classes to undergraduate students, and those prepared at the doctoral level were primarily teaching smaller, graduate classes. Our goal was to determine whether some faculty were overloaded with responsibilities and whether a new formula was needed to distribute the workload more equitably.

**ABSTRACT** The severe shortage of nursing faculty in recent years has led to changes in faculty mix, with nursing programs relying on increased numbers of faculty members prepared at the master's level for coverage of nursing courses. To address the impact of these changes on faculty workload, one nursing program established a Workload Task Force to develop a workload formula that would recognize teaching, scholarship, and service contributions of all faculty members and help ensure equity in workload assignments. Details of the workload formula are offered, along with recommendations for gaining the support of faculty and ensuring transparency in implementation.

**Background** The perception of workload equity is a significant variable related to faculty job satisfaction. For nurse educators, comparing teaching responsibilities with scholarly productivity is incongruous, like comparing apples with oranges. Nurse administrators are often pressured by their university systems to measure the successes of their faculty members by a reward system focused on research, the university benchmark (1). Ironically, faculty members carrying the heaviest teaching loads may see their contributions as undervalued, and those who are the most productive in research and scholarship may feel that the time needed

to invest in their work is unappreciated by colleagues. Little has been written on how faculty workload issues can be fairly considered, how all faculty responsibilities can be valued and appropriately recognized, and how job satisfaction among nurse faculty can be improved while workloads are made fair and equitable and disparities are reduced.

Roberts and Turnbull, in a survey of 291 nurse educators from Australian universities, found that "a high teaching workload can constrain scholarly productivity" (1, p. 289). High teaching workloads involved heavy responsibility in course coordination, teach-

ing, especially clinical teaching, and university service. Respondents noted that in the midst of the nurse faculty shortage, two important factors increased their workload: budgeting constraints and the recruitment of international students, who needed a greater investment of time due to language and cultural barriers. Roberts and Turnbull concluded that some attempt must be made to "quantify workloads objectively" and then use that information to formulate fair and equitable faculty assignments that would address both teaching needs and research requirements (1, p. 291).

Favorable perceptions of workload may result in increased job satisfaction. Voignier, Hermann, and Brouse reported that the development of a teaching workload formula improved faculty's perception of their workload as "more equitable and manageable" (2, p. 38). Doughty, May, Butell, and Tong (3) used the Moos Work Environment Scale in one liberal arts college to assess nurse faculty perceptions of their work environment. Their study found that nurse faculty perceived that the work pressure they experienced exceeded their expectations. Responsibilities that led to perceived high levels of work pressure were "the need to conduct scholarly activities, teach, advise, participate in professional organizations and college committees, as well as the responsibilities associated with providing clinical experiences" (3, p. 195).

Because the nurse faculty shortage looms in the background of any honest analysis of faculty workload, workload issues have implications far beyond job satisfaction and perceptions of fairness. In an article on attracting students to the professorate, Seldomridge (4) noted that students commented on the constant work demands of faculty (class preparation, grading assignments, committee work, and research) for considerably lower salaries than in clinical practice. These perceptions do not bode well in recruiting new nurses into the academic arena. In view of their importance, it is surprising that issues of workload equity and the complexity of the nursing education culture have not been addressed more frequently in the nursing literature.

The studies listed above emphasized the importance of workload equity in attaining scholarly productivity, acquiring job satisfaction, decreasing work pressure, and maintaining high morale for nurse faculty. Administrators in nursing education programs have an incentive to improve working conditions by fairly distributing the responsibilities of the present workforce for those nurses who have chosen academia as a career. Ruby (5), however, noted that tools used to define and determine faculty workload are neither fair nor reliable unless faculty members have participated in their design, implementation, and evaluation. This article describes how faculty in one nursing education program approached this problem.

**Exploring the Issue of Workload Equity** When their workload increases, faculty members tend to look around to see if workload demands are equitable. During a semester of enormous flux and transition at our college, some nurse faculty members expressed concern that certain colleagues seemed to have lighter schedules than others. The process used by administrators to determine faculty workload was not understood by faculty members, and questions arose about the need for a workload formula that would address perceptions of inequity.

Faculty identified three main problems: 1) lack of release time for research and scholarship by tenure-track and tenured faculty; 2) lack of credit for serving as committee chairs or chairing dissertation committees; and 3) failure to adjust the workload for faculty members who were enrolled in doctoral study. Another concern was that special faculty assignments were not communicated openly among colleagues. For example, colleagues might be unaware that a particular faculty member was awarded release time to work on a grant and perceive this faculty member's assignment as inequitable.

The Workload Task Force was established by the associate dean to address issues of perceived workload inequity. The seven members, including the authors, represented undergraduate, graduate, term (non-tenure-track on one or multiyear contracts), tenure-track, and tenured faculty. Our charge was to propose a new workload formula to faculty by the end of the semester. We also wanted the process of determining faculty workload to be more transparent, with resulting assignments to be made public for the entire faculty. It was assumed that an open process would have the added benefit of informing faculty about who was actively engaged in activities such as research, grant applications, participation in college and university committees, or doctoral study. Three meetings were allotted for accomplishing these goals. This short time frame and focused purpose garnered support and enthusiasm for the task.

**GUIDING PRINCIPLES AND ASSUMPTIONS** The aim of the first meeting was to discuss objectives of the task force and to determine the process for evaluating the present workload in the college. The following principles guided the work of the task force:

1. Establish an environment of respect and confidentiality for sharing ideas, feelings, and experiences.
2. Look beyond biases.
3. Avoid invalidating experiences and feelings of others.
4. Learn about each other's struggles.
5. Gather data between meetings to meet established goals.
6. Bring experiences of colleagues back to the task force.

- 7. Focus on a timetable and solutions.
- 8. Work toward the implementation of recommendations.

Task force members also discussed their assumptions related to workload. It was agreed that all full-time faculty members should be able to complete their workload assignment within a 40-hour work week. It was also agreed that the mission and goals of the college should serve as guides in allocation of the workload and that all workload formulations should comply with the University Faculty Handbook. Task force members agreed that all faculty should pursue scholarly excellence in generating, transmitting, applying, preserving, and/or evaluating knowledge. They also acknowledged that because of the diverse nature of academic responsibilities, a standardized formula might not be effective in establishing workload assignments.

Members agreed that workload should be distributed between teaching, scholarship, and service activities for the college and the university, activities that are the basis for performance evaluations for all faculty members in the college. It was agreed that there could be different weights attached to individual faculty allocations in these three areas, with the result that although workload assignments needed to be equitable, they would not be identical.

At the first meeting, the task force also identified the present informal workload policies in the college:

- All faculty members, including the dean, associate dean, and assistant deans, were expected to teach a minimum of one class (three credits) each semester.
- Instructional faculty who were assigned to clinical courses were expected to teach one clinical and one didactic course each semester.
- Faculty members who were not assigned to a clinical course taught three didactic courses (nine credits) each semester.
- Faculty members who were working on grants could “buy out” of responsibilities for one or two courses per semester.
- No consideration was given for class size, new courses, course coordinator responsibilities, dissertation committee work, or independent study guidance.

**WORKLOAD ISSUES** In preparation for the second meeting, each task force member was directed to discuss workload issues with colleagues who had different types of teaching assignments. Their findings were summarized at the second meeting. The task force then decided that it was essential to obtain workload information from the entire full-time faculty. The group developed a survey, to be distributed electronically, asking faculty to keep a detailed log of their activities and time usage for one week (Table 1). It was agreed that the end of October was a good time to survey faculty as it was a relatively typical time in the semester, not

**Table 1. Faculty Workload Survey**

FACULTY RANK (check all that apply):

- Instructor  Assistant Professor  Associate Professor   
 Full Professor  Tenured  Tenure Track  Term   
 Health Science  Nursing

Please keep a diary of how you spend your time on work-related activities. This includes time you spend on work at home. Please keep this log beginning on October 25 through October 31. You can turn it in anonymously by placing a hard copy in a (committee member's) mailbox. You may also return it via email.

|                   | M | T | W | TH | F | S | SU |
|-------------------|---|---|---|----|---|---|----|
| Clinical          |   |   |   |    |   |   |    |
| Class             |   |   |   |    |   |   |    |
| Prep for class    |   |   |   |    |   |   |    |
| Prep for clinical |   |   |   |    |   |   |    |
| Prep for meetings |   |   |   |    |   |   |    |
| Meetings          |   |   |   |    |   |   |    |
| Advising          |   |   |   |    |   |   |    |
| Student meetings  |   |   |   |    |   |   |    |
| Scholarship       |   |   |   |    |   |   |    |
| Email             |   |   |   |    |   |   |    |
| Office hours      |   |   |   |    |   |   |    |
| Other             |   |   |   |    |   |   |    |

REGARDING THESE CATEGORIES:

- Track actual hours spent.
- Advising refers to academic advising.
- Student meetings refer to course-related conferences with students.
- Please include hours that you spend working at home and at the office.
- If this is not a typical week for you, please note that and what makes it unusual.

PLEASE ANSWER THE FOLLOWING QUESTIONS:

- How do you feel about the current workload?
- What are you doing that you are not getting credit for? (administratively this activity is not accounted for in your assignment)
- What are your concerns/comments/questions about the current workload?
- Are there any unique situations that should be accounted for?
- Do you spend time in a practice setting?
- Do you think this should be part of your GMU responsibilities?
- Time allowed for this?
- Other things you would like to add on this topic.



burdened with initial or final course responsibilities. The approximately 90 percent response rate to the survey was attributed to the fact that all task force members actively encouraged colleagues to participate. College administrators were also very supportive with email encouragement for the process.

**ANALYSIS AND DISCUSSION** The third meeting focused on analysis of the survey forms. Perceived and actual disparities in workload were immediately evident. In some cases, the disparities were short term, when one faculty member covered for another who had become ill. Many respondents noted that they were surprised at how much time they actually spent in preparation for courses and meetings, answering emails, and advising, in addition to the time spent actually teaching. Thus, the survey helped highlight many faculty functions that were not readily recognizable.

Discussion then focused on which activities should be included in a workload formula. We devised a "workload unit" system in which each faculty member would be expected to carry 12 workload units (WU) per semester (2). Activities included in the formula are listed in Table 2. Some credit was given for often unrecognized extra responsibilities, such as teaching large classes or a new class and for doctoral study. Inherent in the workload formula was an assumption that if a faculty member had more than or fewer than 12 WU in a particular semester, an adjustment would be made the following semester to help ensure equity over a one-year term.

Task force members agreed that faculty practice was an important issue to address in a workload formula. However, it was decided that the entire faculty needed to be involved in determining a process for formal recognition of time invested in this activity, and the issue was tabled for the future. It was acknowledged that other special and administrative assignments would need to be periodically included in the workload formula, such as time for accreditation preparation activities and new program initiatives.

All in all, the Workload Task Force met for only three meetings, six hours total, to accomplish its goals. Work assignments were accomplished between meetings. With focused, specific tasks, the work was directed and purposeful, and meetings were productive.

**Outcomes** The Workload Task Force was able to devise a new workload formula that uses weighted workload units to address diverse teaching loads, as well as to provide credit for extra activities such as service and scholarship. Although the new formula does not address all components of a faculty member's workload, specific responsibilities are more clearly weighted, workload equity is easier to establish, and assignments are visible to all faculty. Table 3 illustrates how assignments for a sample of tenured, tenure-track, and term faculty were made for one semester according to the workload formula.

**Table 2. Workload Formula (2)**

Full-time faculty workload for 10 months = 12 WU/semester

Tenure-track/tenure faculty = 75 percent teaching (9 WU); 25 percent scholarship and service (3 WU)

Term faculty = 85 percent teaching (10 WU); 15 percent service (2 WU)

Term, tenure-track, and tenured faculty may negotiate with their evaluators to change the ratio of teaching, scholarship, or service included in their workload.

|  |   |
|--|---|
| Undergraduate or graduate didactic class       | 1 credit = 1 WU   |
| Undergraduate clinical with direct supervision | 1 contact hour = 0.45 WU  |
| Undergraduate clinical with preceptor          | 1 contact hour = 0.4 WU   |
| Graduate clinical with preceptor               | 0.1 WU/student X course credit  |
| Campus lab                                     | 1 credit = 1 WU   |
| Clinical course coordinator                    | 1 WU  |
| Large course (> 60 students)                   | 1 WU  |
| New course or first time taught                | 1 WU  |
| Doctoral dissertation chair                    | 0.5 WU/student/year (each student can be counted for maximum of one year) |
| Member dissertation committee                  | 0.2 WU/student/year (each student can be counted for maximum of one year) |
| Chair independent study                        | 1 credit = 0.1 WU   |
| Doctoral study                                 | 0.3 WU/course; 1 WU for dissertation work (maximum of 2 semesters)        |
| Administrative assignment                      | WU determined by dean/associate dean                                      |
| Special assignment                             | WU determined by dean/associate dean                                      |
| Faculty practice                               | TBA   |





Members of the task force were pleased with the results of these efforts. All faculty ranks and positions were included in the development of a formula designed to ensure equity among all types of faculty appointments and to make the process for workload assignments more transparent. A few faculty members, however, reacted to the new formula with a mix of anxiety and anger. The process of exposing the present workload brought to light areas where individual faculty thought they should get more credit for various administrative and scholarly endeavors, even though these functions were not allocated in the previous workload process.

With all proposed or actual change, certain barriers exist that can impede implementation. Some of the barriers that we found related to the same issues that motivated the original formation of the Workload Task Force. These included an inability of tenured, tenure-track, and term faculty members to see and appreciate each other's responsibilities; the pressures of a complex organization that make equity difficult; and the realities of the faculty shortage and the continued need to increase workloads.

To address some of these barriers, the associate dean wrote the script for a skit that illustrates the different demands on time required for tenured and term faculty. The skit was performed at a faculty workshop. The actors, one tenured professor and one term assistant professor, added humorous touches as they performed. Their audience laughed appreciatively, apparently with new insight into the differing responsibilities of faculty members. After the skit, faculty broke into small, self-led groups to discuss their assumptions and their feelings about whether or not their work is appreciated or respected. Several commented on the value of the discussions and the new insights they gained. They agreed that better communication and increased knowledge about the complexity of all aspects of the various faculty positions would foster greater appreciation and understanding regarding workload issues.

**Recommendations** The new workload formula has been used for two semesters to determine faculty assignments. For the most part, it has appeared to facilitate equitable workload assignments. In reflecting on the Workload Task Force's goals and outcomes, the authors offer several recommendations:

- **PLAN A PROCESS FOR COLLABORATION THAT IS EFFICIENT AND INCLUSIVE IN ORDER TO GET "BUY-IN" FROM FACULTY.** By setting a limited number of meetings to accomplish the workload activities, with specific goals for each meeting, we were able to efficiently and successfully accomplish our goals — and enjoy the process!
- **IDENTIFY TRADITIONS OF THE ORGANIZATION AND DETERMINE WHICH ARE VALUABLE TO MAINTAIN AND WHICH MAY NEED TO BE ADAPTED OR DISCARDED.** Since tenured, tenure-

track, and term faculty traditionally had similar types of workloads in the college, it was difficult for individuals to realize that changes in faculty mix and other contextual changes necessitated a change in faculty workload. For example, an increased emphasis on research within the university resulted in pressure on tenure-track and tenured faculty to increase their research output. At the same time, the shortage of faculty required consideration of an increase in the workload of term faculty to ensure that the teaching, scholarship, and service missions of the college could go forward.

- **IMPLEMENT A PROCESS TO MAKE FACULTY AWARE OF EACH OTHER'S UNIQUE RESPONSIBILITIES.** We found that faculty tended to focus on their own teaching, scholarship, administrative, and service responsibilities and were unaware of their impact on the college. A humorous skit that highlighted the frustrations of different types of faculty, followed by a small-group discussion, helped faculty develop new insights into their roles at the college.
- **MAKE FACULTY ASSIGNMENTS TRANSPARENT.** Initially, after the new workload formula was used to determine faculty assignments, assignments were posted on a bulletin board for all to review. However, this process did not illustrate how the workload formula was actually used to arrive at assignments, that is, WU were not posted. Since then, a grid, as illustrated in Table 3, has been mailed electronically to faculty so that all faculty members can see how assignments were determined and can discuss perceived inequities with their supervisors. The process of ensuring transparency will help highlight specific administrative, program development, or research assignments that otherwise may not be visible.
- **IMPLEMENT A PROCEDURE FOR FACULTY ACCOUNTABILITY.** A workload formula is helpful for ensuring consistency in workload assignments. However, if a faculty member is not accountable for some aspects of the assignment, there should be a procedure for adjusting the workload. For example, a tenured professor who was an excellent teacher but did not maintain a research program agreed to teach an extra course each semester, with reduced expectations for research and publication. Conversely, a term faculty member engaged in doctoral study had an opportunity to participate on a college research grant and was relieved of a clinical assignment to allow time for the research activity. Accounting for these activities through the workload formula helps make the unique contributions of faculty more visible.
- **RECOGNIZE THAT NO WORKLOAD FORMULA CAN ENSURE EQUITY FOR ALL FACULTY MEMBERS.** The many activities in a complex organization make it difficult to attain equity in workload. It was found, however, that even though the new workload

**Table 3. Sample Faculty Assignments for One Semester**

| FACULTY      | WU | ASSIGNMENT COURSE     | TOTAL WU | FACULTY      | WU                    | ASSIGNMENT COURSE | TOTAL WU |
|--------------|----|-----------------------|----------|--------------|-----------------------|-------------------|----------|
| Tenured      | 3  | NURS 440 (3)          | 12       | Newly        | 4                     | NURS 775 x2 (6)   | 12       |
|              | 6  | NURS 441 (5)          |          | Tenured      | 5                     | N331 (4)          |          |
|              | 3  | Scholarship & Service |          | 3            | Scholarship & Service |                   |          |
| Tenure Track | 3  | NURS 597              | 12       | New          | 2                     | NURS 317 (2)      | 12       |
|              | 3  | HSCI 801              |          | Tenure Track | 1                     | NURS 339 (1)      |          |
|              | 3  | NURS 799              |          | 3            | NURS 332 (3)          |                   |          |
|              | 3  | Scholarship & Service |          | 3            | Course release        |                   |          |
| Term         | 2  | NURS 348              | 12       | Term         | 3                     | HSCI 303          | 11       |
|              | 3  | NURS 496              |          |              | 3                     | HSCI 303          |          |
|              | 5  | Admin. Assign         |          |              | 3                     | Coordinator       |          |
|              | 2  | Service               |          |              | 2                     | Service           |          |

NOTE. Numbers in parentheses following course titles indicate credit hours.

formula did not recognize all specific contributions of faculty members, faculty appreciated the effort invested in attempting to devise a workload formula unique to the needs of the college. Highlighting the activities of faculty that are sometimes invisible, such as hours spent in advising, committee work, and course coordination, as well as scholarship and research, was helpful even if minimal credit was given to these activities in the workload formula.

• DESIGNATE A WORKLOAD TASK FORCE TO MONITOR AND EVALUATE THE EQUITY OF FACULTY WORKLOAD. In our college, faculty workload assignments were traditionally implemented in a top-down process, by the associate dean in conjunction with assistant deans. When some members of the Workload Task Force reconvened to draft this manuscript, they concluded that benefits resulting from the initial work of the task force could be maintained more consistently through continued work together. We recommend that a task force meet twice a semester to monitor and evaluate workload policies and make recommendations to the administration for areas of concern that merit consideration. Such areas include workload issues for part-time faculty and the question of which positions are best filled by a faculty member with a terminal degree and which are best met through the clinical expertise of a master's-prepared instructor. With the faculty shortage, research to discern characteristics that differentiate unique strengths of faculty

prepared at PhD and MSN levels will inform curricular assignments overall.

In an ideal world, our new workload formula will be implemented to increase equity across faculty in our college. But above all, we must acknowledge that the needs of our students are our priority. With the present faculty shortage, where there is a lack of a substitute workforce available when unexpected needs arise, faculty recognize that they may incur increased workloads to cover those needs of the college. However, a workload policy that attempts to recognize the unique contributions of each faculty member in the organization will foster the collaboration that is essential in a time of serious faculty shortage. NLN

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**Key Words** Faculty Job Satisfaction – Faculty Workload – Workload Formula – Workload Equity – Faculty Shortage

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