Joint Working Group on Assignment of Duties

Board of Governors Representatives' Summary Report

June 2, 2025

The representatives on the Joint Working Group respect and value the autonomy and flexibility that are hallmarks of academic staff employment. The Working Group's activities were framed in the context of academic freedom and recognition that we are accountable to the Academic Staff Collective Agreement.

We were additionally guided by the intent to avoid creating decision frameworks, directives, and prescriptive outcomes that could reduce academic staff flexibility and choice. We also recognize that each Faculty and School operates at a different scale, that the methods for assignment of duties for academic staff work differ between Faculties and Schools, and that the methods in which academic staff work is conducted are affected by discipline and choice. Therefore, we are focused on situating the discussions and decisions where they are best situated: at the Faculty and School level, with decisions made through processes of collegial governance that reflect the principles of fairness and transparency as well as the specificities of disciplines within the Faculties and Schools

Summary and Areas of Alignment

One key point of agreement is a shared recognition that academic staff workload and the way that academic staff conduct their work has shifted over the past several years and that the rate of change has increased since March 2020. We also agree that these changes necessitate clarity about how workload is assigned and/or selected by academic staff members and how workload is undertaken, within a reasonable scope of practice, time, and effort. Furthermore, there is consensus that "full engagement" in academic duties can appear different from one person to the next and from one discipline to another; relatedly, similar assignments of duties can be experienced differently by different academic staff members. Another point of mutual understanding is that transparency is both necessary and challenging in supporting academic staff and administrators in understanding assignments of duties, recognizing where inequities may exist, and meaningfully increasing equity around assignment of duties.

A second point of shared recognition is that within the assignment of duties, academic staff have significant choice about how many hours and how much effort they will dedicate to particular duties. When academic staff elect to commit to more hours and effort than are reflected in their assignment of duties, particularly on activities that do not contribute to necessary collegial governance functions and/or curriculum delivery, their colleagues are left to carry that load. When peers choose to focus more of their time and effort on activities that do not contribute to necessary collegial governance and/or curriculum delivery, others are left to carry that load. While there may be opportunities for units to review the necessity and structure of service work within Departments, Faculties, or Schools, it is also important for colleagues to hold each other accountable for shared workload that is deemed necessary and important for the academic function of the unit.

Many activities that are within the requirements of academic work do not fall neatly or uniformly within a single category in the PAR. It may be useful for deans and associate deans, along with department chairs where relevant, to provide consistent guidance on where and how those activities can be more consistently reflected in PAR submissions and assessments.

- The professionalism of academic staff positions often requires currency in their discipline. We recognize that attending training or conferences, while important, is not a replacement for the work of doing the teaching and/or research. Professional development – and how it is resourced – tends to align with the

part of the role where the activity is focused: teaching development to improve teaching is part of teaching contributions; research development improves research productivity or success and is part of research. Professional development and related activities should complement contributions and work in either or both areas.

- In academic units where academic staff supervise a large number of graduate students (over and above that envisioned in the FAS model whereby teaching assignments were reduced from 5 to 4 to both encourage and support growing graduate student supervision, training, and programs) and engage in other types of student and research mentorship, it may be advisable for units to create a shared method for tracking and reporting those activities, and to determine whether these contribute to research performance and productivity or support service contributions and outreach or are aligned with teaching and learning activities. It is incumbent upon the individual to articulate how they take this on and where they situate the work. The quality of those contributions is important to recognize and celebrate where and as feasible.

There are many unanswered or unresolved questions that remain. Several conversations addressed time, for example, how to define a standard working week. We discussed how non-teaching terms are or might be harnessed for optimal outcomes, both to ensure that academic staff take allotted vacation time and that staff are meaningfully and fully engaged throughout the year. Additionally, there was recognition, without a clear resolution, that the balance of time and effort that may be reasonable for one person may not be experienced as manageable or appropriate for another. How workload is felt and practiced is affected by many factors, including experience, time of year, family circumstances, and other personal and professional priorities. In further conversations, we must consider feasibility, particularly concerning how to balance collegial commitments to colleagues and students, fiscal realities, and available academic staff complement available.

The working group agrees that the composition and components of academic staff work are complex, nuanced, and experienced differently by individuals. We disagree on the necessity of setting maximum or minimum numbers of courses (or relatedly setting quantitative norms for production of research outputs or funding inputs, or number of committees served). While creating standardized assignments of duties may improve feelings of fairness and equity or potentially simplify administrative work in determining assignments across complex Departments and Faculties/Schools, the diverse nature of teaching, research, and service work means that, for example, the work involved in teaching one course may not equal that associated with another course, nor may supervision of one graduate student equal the work associated with supervising another graduate student.

There must be flexibility across units in the University regarding the quantity of assigned teaching, expected research performance and engagement, and active participation in service; this will better reflect disciplinary, pedagogical, and time-of-year differences in how work is done, experienced, and completed. We also recognize that for many academic staff members, a lack of transparency about assignment of duties or expectations around quantity and quality of work compound frustrations around actual assignment of duties; we recommend that when addressing assignment of duties, units also consider how to improve transparency and communication of expectations around workload.

Recommendations

Teaching

The working group spent extensive time and effort on identifying various considerations and activities that comprise and impact teaching workload. These include the increasing complexity of adult learners in our classrooms, changes in technology and pedagogical practices, class sizes, and curriculum analysis and revision to align with our resources available.

Some changes that might be considered to improve morale and shared recognition of teaching workload could include:

- Creating transparency about the processes by which course releases may be granted, including a consistent set of eligibility criteria for requesting and being granted a release. Faculties or Schools might consider creating a list of all academic staff who hold release(s) (barring issues with confidentiality).
- Improving onboarding processes to support new academic staff, including supports for faculty members who are balancing new course preparations and establishing research/creative practice programs in their first academic term.
- Ensuring that all new academic staff have the resources and supports required in their first 2 months to prepare for their first academic teaching term.
- Providing the option for academic staff, particularly instructors, to spread their teaching load over 3 academic terms, if financially and logistically feasible to serve curricular and student needs.
- Communicating clear expectations about how to apply Schedule D regarding undergraduate and graduate mentorship and research supervision in PAR processes where there is confusion or question about these contributions.

In all cases, there is general agreement that we need to recognize the complexity and nuance of differences in teaching assignments. We also concurred that it is crucial for academic staff with an adjusted assignment of duties (such as research chair appointments or department chairs) to remain fully engaged in teaching activities; academic staff should generally not teach fewer than half the average course load for their unit and academic position.

There is further recognition that having more insight into the variables that inherently affect some courses more than others relative to the required effort to teach, mentor, assess, and engage expertly with the material and learners--apart from academic staff decisions about their pedagogical approaches--is useful although perhaps not feasible without significant investment of time and financial resources. The implication that creation and routine assessment of such variables for every course and class section can be added to an existing administrator workload is unreasonable. Should there be a strong mutual desire to create more oversight, review, and individual assessment of teaching assignments, additional staff would be required.

Research

Regarding faculty members with research/creative practice as part of their assigned duties, discussion considered whether there is sufficient guidance to faculty members about what full engagement entails in different disciplines and at various stages of an academic career. The group shared ideas about how to better inform faculty about expectations and how these can be reported and assessed not only in the PAR process, but also during promotion and tenure processes, and through nomination for awards.

While there was general interest in creating a more forward-looking approach to identifying research goals in conversation with a dean, associate dean, and/or department chair, it was noted that this could significantly increase the workload of academic administrators without necessarily producing highly informed guidance for the academic staff member. There may be further discussion in this case, since there remain some Departments and Faculties/Schools where the research culture is in development and those disciplinary norms and expectations may not be clear or openly acknowledged and supported. Enhancing the communications around expectations for faculty to develop their independent research program and apply for extramural funding will continue.

The survey indicated mixed perceptions regarding clarity of research expectations; responses to open-ended questions tended to lean away from asking academic administrators to take a more active role in defining either research expectations or activities.

Service

Formal contributions to service are perceived as highly uneven and unequal, particularly in smaller Faculties and Schools and for equity-deserving employees who are disproportionately invited and expected to serve on collegial governance committees, working groups, and special projects. As a collective, work to review and potentially streamline membership and ToR of committees--whether at the Faculty/School or institutional level--should be completed where permitted (i.e. when not defined in the PSLA). Furthermore, Departmental committee structures, administrative committees (e.g., SEARS, Indigenous-focused) and other service committees should be reviewed to assess their necessity and value and whether they contribute to duplication of effort. We must also commit to identifying opportunities to change how we do our collective work as an academic community.

As with Teaching and Research, Service contributions and workload can be experienced very differently by different people, even when serving on the same committees, depending on the preparation required, engagement and participation in the meetings themselves, and activities required between meetings.

Considerations for creating equity in assignments of service contributions may include:

- Creating transparency about academic staff service commitments and contributions (including where and these could be shared)
- Providing guidelines or suggestions for how academic staff can select their service activities, particularly pre-tenure
- Including some committee work that is assigned by the dean with the option for academic staff to choose additional service work that aligns with their career, personal, and professional interests and goals
- Empowering deans, associate deans, and department chairs to intervene on behalf of academic staff who are taking on too much service load, such that they are stressed or less engaged in the other components of their work
- Creating a culture of valuing service work by consistently reporting on and applying PAR assessments that reflect whether service is both evident and sufficient to reflect the typical 20% assignment of duties
- Eliminating or combining committees at all levels and in all units where academic staff contribute, particularly those in which a single decision is discussed multiple times within a given academic unit (i.e. examine when decision making can be delegated to one group rather than having multiple committees decide or recommend a course of action before a decision is made)
- Creating clarity and extending the types of academic discussions and recommendations that are more appropriately decided upon at the local level by subject matter experts and shared for information only at institutional levels
- Electing to not hold meetings that can be replaced with an email
- Preparing a template similar to the Faculty of Education classifications for committees (e.g., level 1, 2, 3) to better support transparency and consistency of service load assignment and accountability, recognizing that a template provides norms that guide equity but cannot create equity without conversation about how different academic members experience that workload

Vacation Days

All employees at the University of Lethbridge have access to paid vacation time in addition to days when the university closes over the December break. Improving morale and a sense of fairness and equity includes supporting academic staff in taking (and perhaps tracking, for personal insight purposes only) their allotted time to disengage from work.

There is a desire to work together to empower academic staff to take their holidays and find ways that work best for them to disengage and refresh. Some suggestions that came forward include:

- Encouraging all academic staff to plan and block their vacation days, ensuring alternative coverage for research students during their absence and setting away messages on their email to manage expectations for connecting, responding, and advising during time away
- Coordinating with colleagues on planning vacation time across the full employment year to reduce the expectations for connecting in and checking on work while not on work time
- Scheduling long weekends and taking 1-day breaks to recharge where it makes sense
- Recognizing the flexibility of academic work that often allows staff to work shorter (and longer) days, to attend family events and school activities during regular business hours, and manage personal priorities within a student-centered workday; how academic staff choose to take time and do work is part of the flexibility that make these careers both highly attractive and challenging

Across the board, when academic staff members elect to privilege one category over the other(s), there is a sense that colleagues have to pick up the slack and fill those gaps rather than working together to create more equitable assignment of duties and contributions to academic life. When staff elect to spend less time in person on campus, students access other staff in the Department or Faculty/School to help them. A review of how a comparable program to the AWA for non-academic employees could work for academic staff would be useful for improving on-campus community connections, morale, student-centered activities and contact, and organic collisions that can create space for new ideas, problem resolution, and collegial conversations.

When staff spend more time on committees or external activities than they strictly have time and energy for, their teaching and research can suffer, adding to the stress they are feeling about those activities. When staff elect to spend more than their fair share of time on research activities, this leaves colleagues with more responsibilities for teaching and learning, collegial governance, and student supports. As colleagues, the collective goal of post-secondary education is to ensure we are focused on student development, whether through our teaching, research and/or service. While the balance of duties may differ slightly across the year or within a term, it is important to ensure that academic staff recognize the need to leverage all elements of their work and benefits, including vacation time.

Respectfully submitted,

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