

1. Purpose

- 1.1 In accordance with Sam Houston State University (SHSU) Academic Policy Statements (APS 790601, Faculty Workload), all faculty members at the College of Osteopathic Medicine will have workloads designed to align with the goals of the university. This ensures that faculty responsibilities in teaching, research, and service contribute meaningfully to the institution's mission. Workloads will be distributed equitably among faculty, considering individual strengths, expertise, and professional aspirations. The distribution process aims to foster a collaborative and supportive academic environment, allowing faculty to engage in their roles efficiently and effectively. By adhering to these principles, the College seeks to promote high standards of academic excellence while supporting faculty development and well-being.
- 1.2 The College of Osteopathic Medicine has chosen to establish and uphold a unified workload policy, developed with the agreement of each department chair and incorporating input from tenured, tenure-track, and non-tenure-track faculty. This workload policy is reviewed annually and requires approval from the Dean and the Provost and Senior Vice President for Academic Affairs.
- 1.3 Department chairs are responsible for assigning workloads to faculty members at the start of each academic year, in consultation with them. They ensure these assignments align with university policies and departmental goals in teaching, research, and service, while considering individual faculty interests and skills. The Dean assigns workloads to department chairs, allowing for negotiations on research time with the Dean's approval. Each year, department chairs submit the finalized faculty workloads to the Dean for approval and reporting.

2. SHSU COM Workload Policy Guiding Principles

- 2.1 Teaching Methods: Medical education relies heavily on hands-on training, simulations, and small group discussions rather than traditional lectures, resulting in a different distribution of teaching time.
- 2.2 Flexible Teaching Models: SHSU COM uses innovative teaching methods, such as flipped classrooms, case-based learning, and team-based learning, which can substantially increase the number of hours spent in planning and preparing for the sessions.
- 2.3 Training for National Competency Exams: Medical students are trained for national competency exams set by medical boards, which necessitates distinct teaching techniques. As a result, faculty must adopt innovative instructional methods that emphasize competency development and real-world application rather than traditional lecture formats. This additional preparation ensures that students are not only knowledgeable but also equipped to face the challenges of clinical practice effectively.
- 2.4 Clinical Duties: Medical faculty often have substantial clinical responsibilities, including patient care and supervision of medical students in clinical settings, which requires significant time and effort outside traditional teaching.
- 2.5 Research Expectations: Many medical faculty engage in research that often involves conducting studies, and publishing findings, which can demand considerable time and resources.

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- 2.6 Accreditation Standards: Medical schools have specific accreditation requirements that dictate curriculum and faculty responsibilities, influencing how workload is structured.
 - 2.7 Interdisciplinary Collaboration: Medical education often involves collaboration across various disciplines and departments, requiring faculty to share teaching and administrative responsibilities.
 - 2.8 Variable Workload: The nature of medical education leads to variability in workload, with peaks during certain times (e.g., exams, clinical rotations) that may not be present in other academic fields.
 - 2.9 Service and Administration: Medical faculty frequently participate in governance and administrative roles that can take up a significant portion of their time, impacting their teaching load.
 - 2.10 Evaluation Pathway Alignment: Faculty workload assignments shall be explicitly aligned with the faculty member's selected evaluation pathway (e.g., Research-Intensive, Teaching-Intensive, Balanced, or Patient Care-Intensive), as defined in the College of Osteopathic Medicine (COM) Promotion and Tenure (P&T) Guidelines for tenure-track faculty and the Guidelines for Promotion of non-tenure track faculty. Workload expectations, effort distribution, and assigned credits shall reflect the relative weightage associated with the chosen evaluation pathway to ensure consistency between annual workload, faculty evaluation, and promotion criteria.

3. **Workload Assignments**

Workload assignments will be determined using the relative Full-Time Equivalent (FTE) of individual faculty members as a primary reference point. These calculations will serve as a starting basis, but final decisions will be made following consultations with the department chair and the dean. This collaborative approach ensures that workload distribution is fair, equitable, and aligned with departmental needs and institutional goals.

At the time of annual workload assignment, each faculty member's workload distribution shall be informed by their approved evaluation pathway, in accordance with COM Faculty Evaluation System (FES) standards and COM P&T guidelines. The proportion of workload allocated to teaching, scholarly and creative activity, service, and patient care (if applicable) shall be adjusted to reflect the pathway-specific weightage expectations established in COM promotion and evaluation policies.

Department Chairs, in consultation with faculty and with approval of the Dean, may differentially allocate workload effort across domains to support faculty success within their selected pathway, provided that the total assigned workload meets the faculty member's FTE obligation. Any deviation from pathway-aligned workload distributions must be documented, justified, and approved by the Dean, with consideration given to accreditation needs, curricular demands, and institutional priorities.

4. **Workload Credits**

A detailed list of core responsibilities, teaching, scholarship/research, service, and clinical duties, along with their associated time commitments and workload credits, is provided in the appendices below. To support workload management, an Excel-based Faculty Workload Calculator has been developed, utilizing the metrics outlined in the appendices. This tool calculates the time allocated to each category and determines the corresponding Full-Time Equivalent (FTE) for faculty workload.

The faculty workload for 1.0 FTE is defined as 1,920 workload credits per year, fulfilled according to the FTE arrangement established at the start of the evaluation year.

Workload credits shall be interpreted and applied in the context of the faculty member's approved evaluation pathway. The same activity may carry different relative significance toward annual workload fulfillment depending on pathway designation.

For example:

- Faculty on a **Teaching-Intensive** pathway may fulfill a higher proportion of their annual workload credits through instructional activities, course or clerkship leadership, assessment development, and curriculum design.
- Faculty on a **Research-Intensive** pathway may fulfill a higher proportion of their annual workload credits through scholarly and creative activities, including research project development, grant submissions, publications, and mentoring of scholarly activity.
- Faculty on a **Balanced** pathway may distribute workload credits more evenly across teaching, scholarship, and service domains.
- Faculty on a **Patient Care-Intensive** pathway may allocate a greater proportion of workload credits toward clinical service and related educational or quality improvement activities.

Assignment of workload credits shall be consistent with the pathway-specific percentage weightages outlined in COM P&T and promotion guidelines and documented using the COM Faculty Workload Calculator. Annual workload review shall include verification that assigned workload credits reasonably support the faculty member's ability to meet evaluation and promotion expectations within their selected pathway.

Appendix 1
Teaching Related Activities and Workload Credits

Teaching Activities	Type	Workload Credits
Classroom teaching	New lectures	20 hours of preparation time for every 1 hour of teaching session
	Old lectures with major updates	9 hours of preparation time for every 1 hour of teaching session
	Old lectures with minor updates/Old lectures	6 hours of preparation time for every 1 hour of teaching session
	Case based learning or TBL - Case development and facilitation	20 hours of preparation time for every 1 hour of CBL/TBL session
	Case based learning -facilitation only	3 hours of preparation time for every 1 hour of facilitation session
	Review session	As required - *Self-reported
	One-on-one student learning	As required - *Self-reported
Laboratory teaching	Labs, SPs, etc.- Case development and facilitation	20 hours of preparation time for every 1 hour of laboratory session
	Labs, SPs, etc - Facilitation only	3 hours of preparation time for every 1 hour of laboratory session
Assessment	Exam question writing (NBOME MCQ)	2 hours of preparation time for every 1 hour of teaching session
	Pre-exam review	As required
Course or Clerkship director	Year 1 & 2 Courses	60 hours per course credit hour
	Year 3 Clerkships	6 hours per week of core clerkship
	Year 4 Clerkships	2 hours per week of elective clerkship
Curriculum design	Blueprinting, New course development/major revision, Discipline blue printing/review	As required - *Self-reported
Assessment team	Pre-exam review	As required - *Self-reported
Professional development	Mandatory & voluntary training	As required - *Self-reported
	Developing a professional development training/workshop related to teaching	4 hours of preparation time for developing 1 hour of professional development training

Appendix 2
Scholarship/Research Related Activities and Workload Credits

Scholarship/Research Activities	Type	Workload Credits
Project preparation, Data collection and Analyses	Research time (non-mentoring)	*Self-reported
Mentoring	Project or Research mentor	1-3 contact hours per week per project
Preparation and Submission	Abstract	1-4 hours per abstract
	Manuscript	80-100 hours per 1 st or last author manuscript; 20-40 hours per middle author manuscript
	Book chapter	80-100 hours per chapter
	Grant proposals	Internal <\$50,000 – 10-20 hours
		Internal>\$50,000 – 20-30 hours
		External-Foundations<\$50,000 – 20-30 hours
		External-Foundations>\$50,000-30-40 hours
		External-Federal>\$100,000-300-400 hours
		Multi-institutional grants (Multi PI)>\$100,000-120-150 hours
Presentations – Preparation & Delivery	Poster	8-10 hours per poster
	Oral-Short~15 minutes	8-10 hours per presentation
	Oral-Longer~45-60 minutes	16-20 hours per presentation
Research Conference & Professional Development	Conference/Meetings	*Self-reported
	Developing a professional training/workshop related to research/scholarship	*Self-reported

Appendix 3
Service/Administration Related Activities and Workload Credits

Service/Administration Activities	Type	Workload Credits
SHSU/COM Program or Initiative Director	Departmental Chair	0.4 or Assigned FTE
	Other Administrative Positions (Academic enrichment liaison, Director of X)	Assigned FTE
	Standing committee chairs	0.1 FTE for chair of all COM Committees; 0.15 FTE for Admissions Committee
COM Committee Members	Academic Leadership Council	0-48 hours – Considered light workload
	Admissions committee	0-185 hours – Considered heavy workload
	Curriculum committee	0-96 hours – Considered medium workload
	SPAP committee	0-96 hours – Considered medium workload
	Research committee	0-96 hours – Considered medium workload
	FES committee	0-96 hours – Considered medium workload
	Search committee	0-48 hours – Considered light workload
	Any Sub-committee or work group	*Self-reported
	Other committees	*Self-reported
SHSU Committees	IRB	0-24 hours-Considered ultra-light workload
	IACUC	0-24 hours-Considered ultra-light workload
	IBC	0-24 hours-Considered ultra-light workload
	Awards committee	0-24 hours-Considered ultra-light workload
	ORSP FRC	0-24 hours-Considered ultra-light workload
	Other committees	*Self-reported
External Service	Journal Editorial Board	*Self-reported
	Journal Ad-hoc review	0-4 hours per manuscript
	Grant proposal reviews	*Self-reported - 1-48 hours (refer to grant workload calculator)
	Professional Societies and organizations (Working	*Self-reported

	committee, AACOM, IAMSE, Professional Board Membership, NBOME National Faculty, etc.)	
Student Advising	COM student organizations	0-20 hours per year
	Individual student advising	1 hour per month per student
Professional Development	Developing professional development training/workshop related to service	*Self-reported
Community service		*Self-reported

Appendix 4**Patient Care Related Activities and Workload Credits**

Clinical Activities	Type	Workload Credits
Patient care	Patient time and related administrative work	Patient care hours times 1.3 to accommodate related charting
Call	On-call patient care	0-4 hours per week of On-call duty
Quality improvement projects	Projects related to improving patient care quality	8-10 hours per project
Policy Improvements	Creation of policy statements, triage documents and other items to improve patient care	4 hours per item

REFERENCES

1. Academic Policy Statement 790601-Faculty Workload
2. Academic Policy Statement 820317-The Faculty Evaluation System of Tenured and Tenure Track Faculty
3. Academic Policy Statement 890301-Hiring, Evaluation, Promotion, and Merit for Non-Tenure Track Faculty
4. Academic Policy Statement 900417-Faculty Reappointment, Tenure, and Promotion of Tenured and Tenure-Track Faculty
5. Academic Policy Statement 980204-Performance Evaluation of Tenured Faculty

6. University of Massachusetts Education Effort Assignment Task Force Final Report
7. Texas College of Osteopathic Medicine faculty workload model
8. New York Medical College Faculty Effort Calculator (Pamela Lucchesi, Associate Dean of Faculty Affairs, currently at UT Taylor, TX, personal communication)
9. Talmon et al. *Medical Science Educator*, 21:169-176, 2011
10. Geisinger Commonwealth School of Medicine - Faculty Senate Task Force
11. Cooper Medical School of Rowan University (Susan Perlman, personal communication)
12. <https://www.med.upenn.edu/fapd/assets/user-content/documents/Guide%20for%20Using%20the%20Tracking%20Tool%20for%20Teaching%20Effort.pdf>
13. TB Sloan et al, *Academic Medicine* 80:994-1004, 2005
14. Rouan GW *J Gen Intern Med* 14:327-332, 1999