

X. Article 20 Workload

1. Major Workload Considerations

As might be expected from any workers, the most commonly heard employment complaints from CSU faculty are the related issues of salary and workload. Faculty workload concerns are driven by at least two fundamental problems⁸: 1) the pressure created by the continued, explosive growth of the CSU student body [Exhibit X-1], which has served to drive up class size (with attendant workload issues such as advisement and grading); and 2) the shift of the CSU faculty work force from one predominantly tenured or tenure-track to one predominantly temporary.⁹

Unfortunately, there are very few or no magic solutions to faculty workload issues that do not entail money, and large amounts of it. Such funding must come from the State or from a reallocation of available CSU resources, which would require reversing a decade-long trend of diverting instructional funds (faculty positions) to other institutional programs - including the unbounded growth of CSU Administration. [Attachment X-2] Such funds are necessary in almost any scenario contemplated, whether it be lowering student/faculty ratio by hiring many more faculty per se, or by hiring more tenure-track faculty to share both in the teaching and instructionally-related chores of the institution.¹⁰

⁸ In reality, a third problem also exists, e.g. CSU's propensity to de facto plan for and allow ever-increasing faculty workloads through the mechanism of its budgeting process. Each year CSU plans for anticipated enrollment growth - growth which, in turn, generates additional base budget funding from the State on a per capita basis. This money is consistently received from the State but because CSU fails to routinely allocate such funds -- or any identifiable increase in funds -- to hiring, particularly tenure-track hiring, workload for a relatively stable (or in some cases declining) tenure-track faculty goes up as they are forced to teach more students. It also should be noted here that this is this same phenomenon which has driven up the use of "cheap" temporary faculty in the CSU. To accommodate enrollment growth, CSU converts more and more of its payroll and tenure-track faculty positions to lecturers who teach more classes at a lower salary rates than do tenure-track faculty.

⁹ CSU lecturers are hired as teachers and are paid to perform very few, if any, of the various faculty responsibilities associated with running the larger educational enterprise. Tenure-track faculty, for instance, determine curricula, handle all forms of advisement including for advanced degrees, and are responsible for all faculty self-governance activities such as evaluation, campus committees, planning, etc. As the number of tenure track faculty has declined (and declined drastically), these various non-teaching responsibilities have fallen increasingly and disproportionately on the remaining tenure-track faculty, dramatically increasing their overall workload in these areas as well.

¹⁰ Because full-time lecturers normally teach 15 Weighted Teaching Units (WTUs) per semester and full-time tenure-track faculty normally teach 12 WTUs, a shift in the direction of tenure-

Faced with similar issues in the last round of bargaining, CFA agreed to a CSU proposal which entailed guaranteeing a fixed number of tenure-track faculty searches each year in the context of what was represented to the Union as a known success ratio for such searches. The plan failed miserably, however, as numerous campuses cancelled or curtailed scheduled searches shortly after the contract was implemented. This bad faith on the part of CSU has caused the Union to insist in these negotiations that workload remedies be found that can be effectively enforced, and (when additional State funding is needed) carry with them a stronger probability for success.

2. Special Workload Considerations

Although the large majority of bargaining unit members are teaching or classroom faculty, the overall unit is unique in its diversity, including sizable numbers of "faculty" broadly defined who primarily provide educational services other than classroom teaching. Among the more significant and distinct of these groups are librarians and psychological counselors.

Because both librarians and counselors primarily work scheduled, 40-hour weeks, they have been largely overlooked in discussions of Unit 3 workload problems. That is not to say that such problems do not exist for both groups, however, because they face the same pressures as other faculty driven by increasing students ("clients" to serve) without attendant growth in the numbers of librarians and counselors to provide service. In fact, in the case of counselors, there has been a significant overall decline in counselor employment as the CSU student body has grown. [Attachment X-3]

CFA believes it is long past time that CSU pay serious attention to these problems - both to verify the nature of issues surrounding workload increases as well as to at least begin the process of finding solutions. During the mediation phase of these negotiations, CFA proposed the establishment of two special workload study committees, one for librarians and one for counselors, which would explore such topics as staffing levels in a modern library and appropriate case loads for counselors. CSU appeared amenable to these proposals; but following the breakdown of mediation in the wake of CSU's November 20, 2006 "take it or leave it" package, no further discussion of these points occurred and no paper codifying a potential agreement was ever exchanged.

CFA Position:

1. ACR 73

As with other contractual issues such as the CPEC salary gap, increased faculty workload is an issue to which CSU pays lip service but never delivers improvements. A prime example is

track hiring actually costs more because more tenure-track faculty are required to teach the same number of units taught by lecturers.

the 2001/03 work of CFA, the CSU's Statewide Academic Senate, and the CSU Administration, which studied the workload increase phenomenon and issued a joint report both verifying the workload problem and recommending the hiring of additional tenure-track faculty. [Attachment X-4] This report was substantially based on the 2002 findings of a respected faculty researcher and "pollster" from CSU San Marcos (Richard Serpe) whom the Administration had retained to document the workload situation. Serpe surveyed a sample of other U.S. higher education institutions, as well as CSU faculty, and found that in the various components of faculty workload, CSU faculty workloads were higher than those of their national colleagues. [Attachment X-5]

Next, understanding the probable need for additional State resources to accomplish the goals of this report, the CFA sponsored (and the Senate and Administration supported) the passage of a Joint Legislative Resolution, ACR 73, in which the State Legislature adopted the goals of the CFA/Senate/CSU report. [Attachment X-6] Although such Joint Resolutions are non-binding and carry with them no automatic appropriation of money to implement their statements of principle, it was thought that CSU would next begin a meaningful effort to seek funding for ACR 73 (probably in incremental steps), and so report those funding needs to the Legislature [Attachment X-7]. As described in greater detail in the salary portion of this presentation, what actually happened, however, was another piece of CSU budgetary "slight of hand."

Because it was locked into a so-called "Compact," negotiated by Chancellor Reed with the Governor, which restricted the amount of budget increase CSU could seek in any given year, CSU was reluctant -- or refused -- to ask for ACR funding in a manner that would have produced the necessary money to fund the needed faculty hiring. This could have been done, for instance, if CSU in its budget identified the ACR faculty hiring program as falling within the dollar parameters of the "Compact" dollars promised for that year. Instead, CSU assigned other budget "priorities" to the Compact money and listed ACR only as among CSU's "budget challenges" (06/07) or "unmet needs" (07/08) -- categories it did not vigorously support for funding (not wanting to break its "Compact") and that were known in advance to have no chance of success because of "Compact" deals already made with the Governor. [Attachment X-8]

CFA believes that the only way to change CSU's duplicitous approach to growing faculty workload problems is to obtain contractual guarantees that implementation of ACR 73 will begin, and perhaps be brought to full conclusion, during the term of this contract. This can be done by guaranteeing that each year CSU will include ACR funding in the portion of its budget request most likely to be funded - the "Compact." In the alternative, the contract can include specific tenure-track growth percentages or hiring dollars and be submitted for funding to the Legislature through the vehicle of the settled collective bargaining agreement, the process anticipated in HEERA.

2. "Overloads"

Historically, CSU has maintained a policy of providing assistance and compensation to those faculty who are asked to teach classes with inordinately high student enrollments.

Assistance is sometimes provided in the form of Graduate Assistants, who handle such things as discussion sections and grading, while compensation normally takes the form of higher Weighted Teaching Unit (WTU) allocations for classes with high enrollment.¹¹ Unfortunately, the operative word here is "sometimes" - as the crush of enrollment or what might be called "disfavoritism" at times works to deny some faculty (frequently lecturers) the overload compensation that is due.

Initially, CSU's WTU crediting system (or "course classification" system), including the mechanism for overload adjustments (see Appendix B), was contained in a Chancellor's Office policy document designated as EP&R 76-36, the foundation of System policy for determining faculty workload.¹² [Attachment X-9] After contractual changes made in the mid-1990s to accommodate greater administrative and faculty flexibility in determining workload, however, CSU has vigorously argued that the old EP&R system is either dead or at least no longer contractually enforceable -- a position contrary to the stated intent of the Parties as documented in the October 16, 1995 "side letter" between the Parties. [Attachment X-10] Despite this argument, the overload compensation mechanism remains in partial use and "on the books" as an integral part of the CSU budgetary system, now contained in another System policy document, the "Academic Planning Data Base. [Attachment X-11]

Until such time as CSU stops budgeting for faculty workload increase and hires sufficient faculty to halt or decrease recent workload increases, CFA believes that relief must be provided to all faculty asked to teach inordinately high student loads. This can be accomplished through the relatively easy expedient of clearly making the existing overload relief policy contractually enforceable so that if such relief is denied, a faculty member may at her/his discretion seek redress through the grievance procedure.¹³

¹¹ Most CSU courses (lectures) are credited at 3 WTUs for workload purposes, with the standard workload expected of tenure-track faculty set at 12 WTUs (or 4 courses) per semester and 15 WTUs per semester for lecturers. For a high enrollment course (or one of greater complexity and academic demand), however, 4 WTUs might be credited so that a tenure-track faculty member might be expected to teach only 3 such courses during a semester or have her/his overall load balanced out with one 4 WTU course and one 2 WTU course (a lab, for instance) during the term of a semester or academic year.

¹² The first emendation of this document issued in 1981 called it the "single basic source for existing faculty workload policies."

¹³ In opposing this CFA proposal, CSU has yet to come to grips with the reality of statutory mandates concerning implementation of the Education Code grievance procedure as previously discussed in the Article 10 portion of this presentation. In one manner or another, the APDB and other faculty workload issues will be subject to grievance under the expanded definition of grievance contained in the Education Code. What is at issue here is whether or not inclusion of specific contract language on the topic will help bring consistency and broader understanding to overload compensation, thus easing the grievance burden and the unknown consequences of multiple grievance decisions that will be issued without such guidance.

3. Workload Committees

The Parties should establish special workload committees to examine the special workload needs of librarians and counselors. These committees should complete their work within a reasonable period of time and report back to the Parties the problems that have been identified and any potential solutions that seem desirable.