

# FIVE-COURSE LOAD PLAN

PRESENTED BY THE COMMITTEE ON STAFF PLANNING

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FINAL REPORT

3/30/06

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## INTRODUCTION

The Bucknell campus has discussed the goals and rationale for reducing the course load of faculty for some years. For example, the Planning & Budget (P & B) subcommittee produced a white paper during the spring of 1999 on the strategic importance of moving faculty from a six-course load to a five-course load and provided cost estimates to do so. Because P & B argued that course-load reduction would require the creation of new faculty lines, the Committee on Staff Planning (herein defined as the “Committee”) began discussions during the spring of 2001 of how to reduce course loads, including estimations of the number of new faculty lines necessary.

The Committee conducted a preliminary survey in May 2001 about the potential impacts of a shift to a five-course per year teaching load. The findings of this survey were reported to the faculty in April 2002, and in response, the university faculty directed the Committee, after consultation with other relevant committees, to present a set of options during the fall of 2002 for decreasing the current six-course per year teaching load of the faculty. The Committee in the fall of 2002 presented different alternatives for reducing the teaching load and recommended the adoption of the five-course option.

The faculty in 2003 charged the Committee to proceed with planning for the implementation of a reduced course load. More specifically, the faculty asked that the implementation plan contain the following sections:

- A) rationale for the plan;
- B) principles to guide the implementation and impact of such a plan;
- C) how existing resources can be used to make the transition;
- D) number of new positions needed;
- E) projected costs of the plan; and
- F) timetable and procedures for implementation.

Since its charge, the Committee has provided several updates to the faculty. In the fall of 2004, the Committee reported on the principles that would guide the development and implementation of the Plan, and at the April 2005 faculty meeting the Committee presented the results of the five-course load survey. The last update was provided during the faculty meeting in February 2006. At that meeting the Committee presented a three-year timetable for the implementation of the five-course load plan.

### I. Rationale for Moving to a Five-Course Load

**[This section is a revised version of the document titled “Enhancing the Quality of Education: Options to Reduce the Course Load” that was presented to the faculty in November 2002. The original wording of that document can be found in Appendix 1. The Committee has made several stylistic and substantive changes in different places in this section. More specifically, the Committee deleted two sentences relating to expectations about scholarship and standards for retention, tenure and promotion found under the**

**headings of “Balancing Teaching and Scholarship” and “Risks Associated with Course Load Reduction.” Issues relating to scholarship and retention are outside the jurisdiction of the Committee and the charge given to the Committee by the Faculty in 2003. Such questions are better addressed at the departmental and university levels. Changes affecting content are noted in bold bracketed text.]**

The Committee has framed its discussions of course-load reduction with the overarching goal of sustaining, strengthening, and extending the quality of the undergraduate education that Bucknell University offers. This goal includes making more faculty time available for teaching, enhancing faculty-student interaction outside the classroom, improving pedagogy, making more time available for scholarship, attracting and retaining the best faculty, and increasing faculty participation in the Bucknell community. To this end, the rationale for decreasing the load includes (1) pedagogical goals; (2) making more faculty time available to students; (3) enhancement of faculty recruitment, retention, and morale; and (4) balancing teaching and scholarship.

### ***Pedagogical Goals***

The percentage of faculty time devoted to classroom teaching has increased over the past decades – teaching today requires more time per course than it did a decade or two ago. This increase stems from many sources including the use of technology, preparation of visual teaching tools, use of group projects and collaborative learning, shifts in laboratory instruction from demonstration to investigative projects, adaptation of teaching techniques to address multiple learning styles of a diverse student body, commitment to interdisciplinary programs (e.g., Comparative Humanities, Environmental Studies, Women’s and Gender Studies) and courses such as capstones, writing courses, and foundation seminars, the need for assessment, and staying up-to-date in one’s discipline given an explosion of information. In addition, more teaching today occurs outside the classroom. The Bucknell faculty, while continuing to eagerly accept the supervision of independent student research projects and mentoring of honors thesis research, must now find and support student internships and international study opportunities and direct Presidential Fellows. The faculty wants to continue to do what it does well, but it wants to do it even better.

### ***Making More Time Available for Students***

Bucknell needs to encourage further faculty-student engagement outside the classroom through continued improvement of student advising and mentoring (e.g., independent student research projects, honors theses, Presidential Fellows), enhanced faculty interaction with student organizations, and increased faculty availability (e.g., more reliable office hours). The Bucknell faculty encourages itself to develop strong academic relationships with students. Bucknell students expect, and the faculty attempts to provide, the extensive personal contact outside the classroom that makes the difference between an adequate education and an outstanding one. As pointed out in the P & B white paper – the faculty member who supervises several honors projects will spend a number of hours a week with each student; will spend additional time reading and commenting on drafts of the student’s work; and will find himself or herself thinking about the subjects at other times as well. Likewise, the faculty member who supervises a group of students in undergraduate research will spend many hours with students each week; will read

and critique the reports that students prepare; will assist students in thinking through their approach to the problem; and will help lead students to a realistic understanding of a significant problem. These forms of personal contact with faculty constitute the highest form of learning that Bucknell can afford our students. And they demand that the institution find ways to reduce the standard classroom-based teaching load. The Bucknell faculty needs to fulfill the expectations that students bring to our campus for their undergraduate experience, and Bucknell must support faculty commitment to personalized teaching and learning. The faculty is committed to every student that Bucknell admits; and the faculty is dedicated to helping each student be successful.

### ***Enhancement of Faculty Recruitment, Retention, and Morale***

Bucknell is committed to improving its ability to hire and retain the best possible faculty. The six-course load employed at Bucknell is the heaviest found among selective liberal arts colleges and universities. A comparison list of 37 institutions that includes our new frame-of-reference institutions and *US NEWS* top-tier liberal arts institutions, indicates that eight institutions (22%) have a four-course load (Amherst, Bowdoin, Lehigh, Sarah Lawrence, Smith, Villanova, Wellesley, and Wesleyan); 24 (65%) have a five-course load [Barnard, Bates, Bryn Mawr, Colby, Colgate, Connecticut College, Davidson, Franklin and Marshall, Grinnell, Hamilton, Haverford, Holy Cross, Lafayette, Macalester, Middlebury, Mt. Holyoke, Oberlin, Occidental, Pomona, Richmond, Swarthmore, Trinity, Williams, and Vassar]; one (3%) has a 5.5 course load (Kenyon); and only four (11%) have a six-course load (Bucknell, Carleton, Dickinson, and Union). Bucknell does not compare well with frame-of-reference institutions and *US NEWS* top-tier liberal arts institutions, and the university is competing for faculty with more institutions with lower teaching loads than it did a few years ago. As a consequence, Bucknell is losing highly qualified candidates and faculty to the competition more often in a marketplace that is more challenging than it was just a few years ago.

### ***Balancing Teaching and Scholarship***

The scholarly pursuits of the Bucknell faculty encourage passion for learning and provide the environment for undergraduate research. The 1999 Planning and Budget white paper argued that:

“Bucknell has high standards of scholarly productivity and its faculty is already producing scholarship at a rate and level of excellence that matches many of the selective liberal arts colleges with a five- or even four-course teaching load. Such research and publication activities contribute greatly to the reputation of the faculty and the university in general. However, the faculty struggles to balance the demands of writing grant proposals; conducting research; writing, submitting, and revising scholarly publications; advising and mentoring students; and performing essential service for the university while teaching a six-course load.”

The university’s appreciation and understanding of the benefits of scholarship to effective instruction has increased over the past decades. However, the time available for this activity has decreased as other demands on faculty have increased. Scholarly activities have become a pressured pursuit of summers and semester breaks, which inhibit considered preparation for teaching in the following semester, or time for scholarship must be “stolen” from time needed for teaching. The present load is felt to be debilitating by many members of the Bucknell faculty, given the difficulty of sustaining a program of scholarship during the academic year over and

above the six-course teaching load. An institution with high standards of scholarly productivity must support the scholarly activities of its faculty, both to enable junior faculty members to establish a program of research and scholarship early in their career and to encourage tenured faculty to remain committed to their scholarly programs and to continue to contribute to the state of knowledge in their fields. A five-course load will permit members of the Bucknell faculty to conduct themselves at the level of excellence that is expected of them. The options for course-load reduction considered and the recommendation made by the Committee are designed to improve the balance between teaching and scholarship. **[This sentence differs from the original text (see Appendix 1).]**

### **Risks Associated with Course Load Reduction**

There are risks associated with course-load reduction, including curricular losses (i.e., loss of elective courses, loss of sections from introductory courses), increase in mean class size due to the loss of courses and sections, and decreased faculty availability. Bucknell will need to formulate clear expectations of faculty work, availability, and presence on campus if it moves to a five-course load. It has been the experience of some campuses that the transition to a reduced course load has exacerbated the tendency of some faculty to consolidate their teaching in order to keep some days free for off-campus activities.

Bucknell must assure that all departments and programs have a comparable ability to introduce the five-course load and still cover the central curriculum. Similarly Bucknell must assure that this transition does not reduce the ability or willingness of faculty to contribute to general education and interdisciplinary teaching. The university must preserve appropriate balance between upper-level and lower-level courses, and the balance between specialized disciplinary courses and all-university teaching. Bucknell must make every effort to ensure equitable institution of course-load reduction among faculty. **[The last sentence in this paragraph in the 2002 document is deleted in this version (see Appendix 1).]**

The tables found in Appendix 1 outline the major strengths and weaknesses of the four most viable options among the options discussed by the Committee. Also included for each option are important practical considerations associated with a given option. There are substantial costs associated with each option and the benefits of the options vary. The Committee's discussions resulted in a clear recommendation described below.

### **Recommendation**

The Committee believes that the shift to a five-course (3-2) load provides the most benefits, and that the obstacles to its adoption, while appreciable, are surmountable. New faculty lines will be needed to offset partially the loss of courses, and to minimize the increase in average class size. New faculty positions will be allocated to departments or programs through normal procedures of the Committee.

## II. Development and Implementation Principles

In its discussion of what factors should guide the development and implementation of the five-course load plan, the Committee's goal was to ensure that the adoption of the plan would not harm the existing curriculum or the level of quality of undergraduate education at Bucknell. It was of utmost importance that a transition to a five-course load be done correctly. Below we present a list of principles and their rationale under three categories: A) general considerations; B) curriculum; and C) implementation.

### A. General Considerations

*Principle 1. Conversion to a five-course load plan should not be implemented without the necessary addition of new faculty lines.*

Rationale: Adoption of the plan without hiring additional faculty will have a serious negative impact on class size, course offerings, and pedagogy.

*Principle 2. A five-course load plan should be an integral part of Bucknell's next strategic plan.*

Rationale: The plan should be consistent with Bucknell's overall strategic vision and properly funded.

*Principle 3. A five-course load should result in enhancing the undergraduate education at Bucknell.*

Rationale: The plan will create more time for one-on-one instruction outside the classroom, experimentation with different pedagogical approaches, refining existing courses, and designing new ones.

*Principle 4. The change to a five-course load should be used to bring more balance to Bucknell's teacher-scholar model.*

Rationale: Not enough time exists during the year to pursue and maintain research under the current course load. The new plan will free up time to prepare papers for conferences or publication, complete monographs or conduct scientific research.

*Principle 5. Development of a five-course load plan should account for how existing resources can be used to achieve this goal.*

Rationale: The university should examine ways in which it can reclaim some course releases. However, the plan should not create new inequities among faculty.

### B. Curriculum

*Principle 6. A move to a five-course load should not compromise the academic quality of each major.*

Rationale: Conversion to a five-course schedule should not be achieved by diluting the current requirements for each major. It is imperative that the five-course plan be implemented with the necessary resources to maintain the current level of excellence.

*Principle 7. A reduction of courses in elective offerings should negatively impact the fewest number of general education students.*

Rationale: It is important that enough courses are offered to meet the demands of majors and non-majors. Departments might have to alternate offerings of electives from year to year and possibly eliminate non-required small classes.

*Principle 8. Adoption of the five-course load plan should not adversely affect the current offerings of General Education, particularly, Engineering 100, Foundation Seminars, and Capstones.*

Rationale: General Education is an important element of Bucknell's curriculum, and conversion to a five-course load should not endanger this part of the university's offerings. Furthermore, the plan must not be implemented at the expense of Common Learning Agenda (CLA).

*Principle 9. A reduction in course load should not increase average class size by more than absolutely necessary for implementation.*

Rationale: Class size has relevance to pedagogy and is important to the faculty. Class size should not increase to such a level that it damages our national ranking in *U.S. News and World Report*.

*Principle 10. Under the adopted five-course load plan, classes should be offered in a balanced way across the teaching days of the week.*

Rationale: The five-course load plan is not meant to make it easier for faculty to move to a two or three-day schedule. Care must be taken to ensure students have choices when selecting their courses. It is not desirable to have a situation in which a department has a two-day schedule in any given semester.

*Principle 11. Faculty should teach no fewer than 3 courses per year.*

Rationale: It is important that faculty remain engaged as teacher-scholars. In cases in which individuals are entitled to more than two course releases, arrangements should be made to remunerate those individuals beyond the two course releases.

*Principle 12. Classes that enroll fewer than 8 students cannot be taught without the dean's permission.*

Rationale: Many small courses still will have to be taught because of graduation requirements or teaching certification requirements, but raising the limit will allow us to discuss whether advanced courses are being offered too frequently or whether the topic needs to be broadened, for example.

*Principle 13. Sabbatical and Untenured Leaves should be taken during two-course semesters.*

Rationale: This principle stabilizes the curriculum and is consistent with the three-course per year principle.



## C. Implementation

*Principle 14. Allocation of new faculty lines shall be considered through the normal procedures of the Committee on Staff Planning.*

Rationale: The Committee already has procedures for allocating new positions. It is the authorized body to make such decisions. The Committee will have to add new criteria to existing procedures for the allocation of positions under the new plan.

*Principle 15. The course load reduction plan should not decrease faculty presence on campus.*

Rationale: The new plan is not designed to increase faculty absences from campus. The current expectations about faculty presence on campus shall be maintained under the five-course load plan. Faculty presence on campus is necessary to allow for greater interactions and consultations with students.

*Principle 16. Temporary faculty will teach a six-course load.*

Rationale: Expectations for temporary faculty are different from tenure track appointees. Temporary hires do not have the same demands on scholarship and service as tenure track appointments. This measure also will allow for the reclamation of additional courses.

*Principle 17. A five-course load plan should strive to achieve and maintain equity in teaching across different departments and divisions within the university.*

Rationale: Adoption of the plan should not burden some departments and divisions more than others. Current distributions, as measured by the number of faculty, student enrollment, and number of majors, should be used as a benchmark for future comparisons.

*Principle 18. Course offerings within departments should be balanced between the two semesters unless the curriculum dictates otherwise.*

Rationale: A balance in course schedules is necessary to ensure adequate and diverse offerings for each semester. This balance will provide students with flexibility in selecting courses. Such a balance is necessary to prevent competition by faculty for the same students and classrooms.

*Principle 19. The number of sections offered by departments should be roughly equivalent for both semesters.*

Rationale: It is important to ensure that not all faculty members in any given department offer their two courses in the same semester.

*Principle 20. The five-course load plan should be phased in over a three-year period.*

Rationale: For logistical and instructional reasons, implementation of the five-course load plan cannot be done in a shorter period than what is proposed here. It is critical that during the phase of implementation, instability for students and the curriculum should be kept to a minimum, and teaching load equity among faculty cohorts be maintained.

### III. Utilizing Existing Resources

In addition to new hires, the university must regain some teaching credits currently lost to administrative release time in order to accomplish the following: offer more electives that otherwise would be lost; provide academic teaching credit for independent studies; and apply a uniform standard for counting teaching credits for labs. In order to meet these goals, the Committee is suggesting that changes be made to i) the course release program, and ii) faculty administrative release time.

#### **Course Release Program**

The course release program is administered by the Faculty Development Committee and is designed to provide temporary relief for faculty members in the course of a semester to complete an important project. Under the six-course load, a reduction of one course for a specific semester has proved to be a welcome break for many. Usually, 25-30 course releases are allocated per year, depending on the total size of the applicant pool. Since the goal of the program is to ease the teaching load of faculty in a given semester, the transition to a five-course load makes such a program unnecessary. Therefore, the Committee makes the following recommendation:

*The course release program will be discontinued.*

Implementation of the above recommendation will recover 25 sections or approximately the equivalent of five (5) faculty positions.

#### **Administrative Release Time**

Administrative release time is a delicate issue among the faculty. The current release time structure is a product of previous policies and ad hoc decisions. Release time was last addressed and increased during the last administration. In examining this issue, the Committee was careful not to make administrative positions so unattractive that there would not be enough incentives for faculty to assume such responsibilities. The release time for chairs and other administrative duties is designed to free up individuals from teaching so that they can perform those administrative tasks.

The Committee has always maintained and communicated to the faculty that the current release time would have to be adjusted in moving to a five-course load. The Committee also was concerned that no single group of individuals should unduly bear the burden in the consideration of existing resources. Faculty performing administrative duties still must be provided the time needed for their services. In order to fully implement the plan, allocate teaching credit for independent studies, and to try to protect the current sizes of courses, the committee has estimated that roughly 40 courses or sections would have to be reclaimed from administrative release time in addition to what is gained by eliminating the course release program.

It should be emphasized that the five-course load plan cannot be fully implemented without the addition of these 40 courses to be gained from administrative release time. The question of how these releases are to be reclaimed does not have to be decided at this point, since this

measure would not take effect until the third year of the five-course load plan. It is more productive at this stage to review all release time and the rationale for those releases. Therefore, the Committee recommends the following:

*The Provost and the Deans will review the issue of release time and provide the Committee on Staff Planning a plan and rationale for reclaiming these 40 releases by the end of spring 2007 (end of the first year of the three-year transition plan).*

### **Other Faculty Development Programs**

Various faculty development programs exist to help faculty advance their scholarship and pedagogy during summers. The transition to a five-course load will still require the resources of the current faculty development programs. These programs serve an important function in promoting the growth of scholarship and pedagogy outside the academic year.

The Untenured Faculty Leave Program exists to further the scholarly development of junior faculty. Over the years, this program has become a popular and critical resource for untenured faculty members. The program provides a major advantage to junior faculty by providing them with an opportunity to devote extra time to their scholarship early in their careers. The change to a five-course load will not replace the need for such a program.

With respect to these two programs, the Committee recommends the following:

*The faculty development programs and the Untenured Faculty Leave Program will continue to exist in their present formats.*

## **IV. New Faculty Positions**

To determine how many new faculty positions would be needed to successfully implement the change to a five-course load, the Committee was influenced by the following guidelines:

- The curriculum should not be adversely affected.
- The transition should not force departments to decrease the rigor or requirements of their majors.
- CLA, Engineering 100, and other service commitments by each department should be maintained.
- Current class caps should be maintained, if possible.
- Administrative release time would have to be reduced.

### **Five-Course Load Survey**

For the Committee to arrive at a systematic and objective estimate of how many new positions are necessary to convert to a five-course load, the Committee relied on a carefully constructed

survey completed by departments and programs. See Appendix 2 for the full survey. The Committee used the survey to collect information on department staffing, offerings, sections, CLA contributions, and number of majors.

To calculate the impact of moving to a five-course schedule, the Committee queried departments about the impact of eliminating some courses from their offerings, reducing the number of sections of core or introductory courses, and the scheduling of some electives in alternate years. If departments or programs indicated they could not convert without causing significant harm to their offerings, the Committee asked departments to calculate the number and utilization of new positions. The Committee even requested departments and programs to submit a current academic schedule with the six-course load and another academic schedule with a five-course load. The Committee made sure departments understood that the new hires would not be used to expand the curriculum, but to replace essential courses that otherwise would be lost under the five-course load plan.

## **Results**

The Committee carefully examined the responses from each survey as informed by additional data on course enrollments and leave history to help it evaluate the information supplied by each department and program. Decisions by the Committee were reached through consensus for all of the departments and programs examined. After careful consideration of the survey data, coupled with course enrollment data, the Committee estimates that the university will need a minimum of 32 additional faculty lines to successfully convert to a five-course load.

## **Labs and Independent Studies**

During its investigation of release time, the Committee came across two glaring inconsistencies regarding how much teaching credit is awarded to labs and independent studies. The Committee discovered that although labs in the Arts and Sciences consistently count for one-half credit (0.5), this is not the case in Engineering. The current practice in Engineering is for an individual to receive a half credit (2/12) for the first lab section but only a quarter of a credit (1/12) for the second lab section of the same course.<sup>1</sup>

The Committee feels that such inequity should not be maintained under the five-course load. Therefore, the Committee recommends that:

*all labs with a duration of 2-4 hours receive the same credit of 0.5 of a course.*

After this change is implemented, Engineering will no longer use the twelfths system. Both colleges will use the same procedures for allocating credits to courses.

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<sup>1</sup> Engineering uses the twelfth system in assigning teaching credits. Under this system, individuals also receive 1/12 credit for new courses and 1/12 for class enrollments higher than 35. The School of Engineering will no longer receive extra credit for new courses or for classes with enrollments over 35 once the plan is fully implemented.

Another obvious anomaly with teaching credits relates to independent studies. The Committee discovered that only a few departments provide credit for supervising independent studies or research. Again, in attempting to apply uniform standards to release time, the Committee concluded that such inconsistent practices should not continue under the five-course load. As a result, the Committee recommends the following:

*Teaching credit should be awarded to all professors supervising independent studies or research.*

To receive a teaching credit, an independent study should have the following characteristics:

1. The student would work with some degree of independence, not simply working as a research assistant for the professor (which should not qualify for credit for the student either).
2. The faculty member would supervise the individual student for a substantial amount of time each week (at least one hour).
3. The faculty member's teaching would involve preparation for each meeting and reviewing of the student's written work or other products.
4. The student's work would result in a product— a performance or exhibit, a substantial research paper, a creative writing project, a Masters or honors thesis, or a research article or research poster.

Under these conditions, faculty members who register at least four students\* in a semester may receive 0.5 teaching credit. If the number of students is not known ahead of time or the faculty member's schedule is full with other courses, the 0.5 credit can be received in a subsequent semester in which the faculty member is not already receiving teaching credit for independent research. A maximum of 0.5 teaching credit can be earned for the students in a single semester (even if more than four students are taught). A faculty member can take no more than 1.0 course credit (earned and banked combined) in any one semester. Using banked credit for independent study must be approved by the department chair/program director.

The amount of credit shall be based on the following formula\*:

One Student = 0.125 course release  
Four students = 0.5 course release  
Eight students = 1 course release

If faculty members have fewer than four students who qualify for teaching credit, they may bank the credit until they accumulate 0.5 credit for four students. Faculty members in departments that cannot grant partial course release would have to bank one credit for eight students.

\* Teaching credits are based on a full-course academic credit. For a half-course academic credit, teaching credit will be adjusted accordingly.

Generally, this course will be deducted from the teaching load in the semester in which the faculty member is scheduled for her/his maximum teaching load (e.g., the three-course semester for someone without other released time). Alternatively, a faculty member may choose to receive overload pay for an independent study that qualifies for teaching credit.

Applying standard procedures to how labs and independent studies are counted will require the addition of four new positions beyond the original 32 derived from the survey. The Committee feels that these changes are significant and must be supported under the five-course load plan. Thus, the Committee makes the following recommendation:

*Thirty-six (36) new hires are required to successfully convert to a five-course load and to standardize teaching credits for labs and independent studies.*

## V. Projected Costs of the Plan

In early 2004, the Committee on Planning and Budget provided an estimate of the total costs associated with hiring the necessary positions to convert to a five-course load. The Committee recently requested the same committee to provide an update of the total cost of adding 36 faculty positions. The Committee on Planning and Budget calculated that the net budget impact after three years will be \$3.8 million (approximately \$106,000.00 per position). This estimate was based on its model assumptions about inflation, salary increase, and benefits increase (see Appendix 3 for more details).

### Space Issues

The projected costs for the 36 new positions do not include the conversion or the building of new office or lab space. In reviewing available space including existing offices that can easily be assigned to new faculty or reclaiming offices of retirees, the Committee determined the university will be able to house approximately half of the new faculty lines. However, a major drawback of the existing spaces is that they might not be attached to departments. The Committee also notes that lab space could be a problem for some departments after they hire additional faculty.

Therefore, the Committee recommends:

- 1) the identification, preparation, and reservation of available offices to house a minimum of 18 new hires by the second year of the five-course load plan;*
- 2) the expansion, conversion, or creation of the necessary space to house the rest of the new faculty positions by the third year of the plan; and*
- 3) the consideration of additional space requirements of the five-course load plan under the Strategic Plan for Bucknell and the Comprehensive University Campaign.*

## VI. Procedures and Implementation Timetable

In considering the implementation procedures for the five-course load, the Committee is guided by the implementation principles found in Section II of this document.

The Committee's goal is to distribute, present, and have the plan approved by the faculty before April 2006. Once the plan has been approved by the faculty, we anticipate its endorsement by the Administration and the Board of Trustees in April 2006. The following is a list of the steps and the time frame in which they are expected to occur:

- The plan will be distributed to committees and faculty in early March 2006.
- An open forum will be held in late March to discuss the plan.
- The plan will be ready for Faculty vote and Administration and Board approval by April 2006.

### **Five-Course Load Transition Schedule**

The committee forecasts that the hiring of the necessary faculty lines will occur over a two-year period, and the full change over to the five-course schedule will be completed by the end of three years. The Committee suggests the following schedule:

#### 1. SPRING 06

- Departments/programs submit proposals to the Committee on Staff Planning for new faculty needed. Calls for such proposals, including new guidelines, were sent to chairs in late January 2006.

#### 2. YEAR ONE (Fall 2006 - Spring 2007)

- University searches to fill approximately one-half of required new positions, with new faculty on campus by August 2007.
- All newly hired tenure track faculty starting employment during this year receive a five-course load.

#### 3. YEAR TWO (Fall 2007- Spring 2008)

- University searches to fill the remaining new faculty lines needed for transition.
- All Assistant Professors convert to a five-course load.

#### 4. YEAR THREE (Fall 2008 - Spring 2009)

- All tenured professors transition to five courses.
- New procedures for awarding teaching credits for labs and independent studies go into effect, provided that a procedure has been devised to reclaim the equivalent of 40 courses in administrative release time.

## **Two-Thirds Positions**

Tenure-track faculty members with two-thirds appointments currently teach four courses per year for 67% of the normal salary. Under a five-course load these individuals would teach three courses in one academic year and four courses in the next (70% over two years) and their salary would be 70% of the normal salary. If both members of a shared appointment are in the same department, it would be expected that they would alternate their four course academic years so that the couple is contributing seven courses per year.

## **VII. Conclusion**

The five-course load plan presents a major opportunity to move forward and enhance undergraduate education at Bucknell. The Committee has devoted several years to researching this issue and has developed a plan consistent with the charge given by the faculty. The Committee has taken great care to evaluate each part of the plan.

In part one, the Committee evaluated several options for reducing the teaching load of the faculty and concluded that the five-course load option best met Bucknell's needs. The Committee argued that adopting the five-course option would improve 1) teaching, 2) recruitment and retention, 3) balancing the teacher-scholar model, and 4) service.

One major concern of the Committee was to ensure that a transition to a five-course load be accomplished with adequate resources to protect the level of excellence expected at Bucknell. Part II of the plan presented many principles relating to the development and implementation of the five-course plan.

The Committee recognized that not all courses lost in converting to the five-course plan could be compensated for by simply hiring additional faculty. The Committee concluded that it needed to examine existing resources and determine what reasonable sacrifices the faculty could make to protect the curriculum. The Committee recommended the elimination of the course release program and the reduction of administrative release time by 40 courses. The Committee did not advocate any change to the Faculty Development Program or the Untenured Leave Program. The Committee believes that these two programs are critical to meet the university's future objectives under the five-course load.

Applying a systematic and objective procedure to estimate how many new faculty positions would be needed, the Committee devoted a great deal of time to developing and analyzing the results of the five-course load survey. After careful deliberation, the Committee estimates that a minimum of 32 new positions would be needed to convert to a five-course schedule without changing the status quo. The Committee discovered major inconsistencies with respect to how teaching credits were applied to labs and independent studies. The Committee concluded that conversion to a five-course plan presented an opportunity to correct these inequities. As a result, the Committee recommended the application of uniform procedures in assigning teaching credits



to labs and independent studies. However, making such changes requires the addition of four faculty members, bringing the total of new positions to 36, at a cost of \$3.8 million.

The last part of the plan specifies a timetable and procedure for implementing the five-course plan. Again, the Committee was guided by a set of principles to ensure that implementation was done in an equitable manner. The Committee recommended a three-year phase-in schedule to start with academic year 2006-2007.

In sum, the Committee has developed a comprehensive and feasible plan for the university to transition to a five-course load. This plan represents a historic opportunity for Bucknell to move forward and to enhance the quality of undergraduate education. The Committee strongly believes that the five-course load plan is a substantial improvement over the existing six-course load. We strongly urge the faculty, administration, and the Board of Trustees to immediately adopt the five-course load plan described in this document.

## Appendix 1.

### I. RATIONALE/ARGUMENT FOR MOVING TO A FIVE COURSE LOAD

#### ENHANCING THE QUALITY OF EDUCATION: OPTIONS TO REDUCE THE COURSE LOAD OF BUCKNELL FACULTY

##### COMMITTEE ON STAFF PLANNING REPORT TO THE BUCKNELL FACULTY

November 25, 2002

#### Introduction

The Bucknell campus has discussed the reasons and means to reduce the course load of faculty for some years. For example, the Planning & Budget (P & B) subcommittee produced a white paper during the spring of 1999 on the strategic importance of moving faculty from a six-course load to a five-course load and provided cost estimates to do so. Because P & B argued that course-load reduction would require the creation of new faculty lines, the Committee on Staff Planning (CSP) began discussions during the spring of 2001 of the rationale and means of reducing course loads, including estimations of the number of new faculty lines necessary. The CSP surveyed departments and programs in May 2001 relative to the potential impacts of a shift to a five-course per year teaching load. The findings of this CSP survey were reported to the faculty in April 2002, and in response, the university faculty directed the CSP, after consultation with other relevant committees, to present a set of options during the fall of 2002 on methods to reduce the current six-course per year teaching load of the faculty. Consequently, the CSP has been working towards that goal since early this semester. The CSP and the Academic Affairs Task Force for strategic planning share similar perspectives on the goals associated with course-load reduction. This report represents a summation of several years of discussions in the P & B subcommittee, the CSP, and elsewhere. Our list of options with a recommendation is based on the findings of the April 2002 CSP report to the faculty entitled “Results of 3-2 Teaching Load Survey” and CSP reviews of curricular plans for departments and programs.

#### Rationale

The CSP has framed its discussions of course-load reduction with the overarching goal of sustaining, strengthening, and extending the quality of the undergraduate education that Bucknell University offers. This goal includes making more faculty time available for teaching, enhancing faculty involvement outside the classroom, improving pedagogy, aiding the course-development process, attracting and retaining the best faculty, and increasing faculty participation in the Bucknell community. To this end, the rationale for decreasing the load includes (1) pedagogical goals; (2) making more faculty time available to students; (3) enhancement of faculty recruitment, retention, and morale; and (4) balancing teaching and scholarship.

### ***Pedagogical goals***

The percentage of faculty time devoted to classroom teaching has increased over the past decades – teaching today requires more time per course than it did a decade or two ago. This increase stems from many sources including the use of technology, preparation of visual teaching tools, use of group projects and collaborative learning, shifts in laboratory instruction from demonstration to investigative projects, adaptation of teaching techniques to address multiple learning styles of a diverse student body, commitment to interdisciplinary programs (e.g., Comparative Humanities, Environmental Studies, Women’s and Gender Studies) and courses such as capstones, writing courses, and foundation seminars, need for assessment, and staying up-to-date in one’s discipline given an explosion of information. In addition, more teaching today occurs outside the classroom. The Bucknell faculty, while continuing to eagerly accept the supervision of independent student research projects and mentoring of honors thesis research, must now find and support student internships and international study opportunities and direct Presidential Fellows. The faculty wants to continue to do what it does well, but it wants to do it even better.

### ***Making more time available for students***

Bucknell needs to encourage further faculty-student engagement outside the classroom through continued improvement of student advising and mentoring (e.g., independent student research projects, honors theses, Presidential Fellows), enhanced faculty interaction with student organizations, and increased faculty availability (e.g., more reliable office hours). The Bucknell faculty encourages itself to develop strong academic relationships with students. Bucknell students expect, and the faculty attempts to provide, the extensive personal contact outside the classroom that makes the difference between an adequate education and an outstanding one. As pointed out in the P & B white paper – the faculty member who supervises several honors projects will spend a number of hours a week with each student; will spend additional time reading and commenting on drafts of the student’s work; and will find himself or herself thinking about the subjects at other times as well. Likewise, the faculty member who supervises a group of students in undergraduate research will spend many hours in the laboratory with the students each week; will read and critique the lab reports that the students prepare; will assist students in thinking through their approach to the problem; and will help lead students to a realistic understanding of a significant scientific problem. These forms of personal contact with faculty constitute the highest form of learning that Bucknell can afford our students. And they demand that the institution find ways to reduce the standard classroom-based teaching load. The Bucknell faculty needs to fulfill the expectations that students bring to our campus for their undergraduate experience, and Bucknell must support faculty commitment to personalized teaching and learning. The faculty is committed to every student that Bucknell admits; and the faculty is dedicated to helping each student be successful.

### ***Enhancement of faculty recruitment, retention, and morale***

Bucknell is committed to improving its ability to hire and retain the best possible faculty. The six-course load employed at Bucknell is the heaviest found among selective liberal arts colleges and universities. A comparison list of 37 institutions that includes our new frame-of-reference institutions and *US NEWS* top-tier liberal arts institutions, indicates that eight institutions (22%) have a four-course load (Amherst, Bowdoin, Lehigh, Sarah Lawrence, Smith, Villanova,

Wellesley, and Wesleyan); 24 (65%) have a five-course load [Barnard, Bates, Bryn Mawr, Colby, Colgate, Connecticut College, Davidson, Franklin and Marshall, Grinnell, Hamilton, Haverford, Holy Cross, Lafayette, Macalester, Middlebury, Mt. Holyoke, Oberlin, Occidental, Pomona, Richmond, Swarthmore, Trinity, Williams, and Vassar]; one (3%) has a 5.5 course load (Kenyon); and only four (11%) have a six-course load (Bucknell, Carleton, Dickinson, and Union). Bucknell does not compare well with frame-of-reference institutions and *US NEWS* top-tier liberal arts institutions, and the university is competing for faculty with more institutions with lower teaching loads than it did a few years ago. As a consequence, Bucknell is losing highly qualified candidates and faculty to the competition more often in a marketplace that is more challenging than it was just a few years ago.

### ***Balancing teaching and scholarship***

The scholarly pursuits of the Bucknell faculty encourage passion for learning and provide the environment for undergraduate research. The 1999 Planning and Budget white paper argued that:

“Bucknell has high standards of scholarly productivity and its faculty is already producing scholarship at a rate and level of excellence that matches many of the selective liberal arts colleges with a five- or even four-course teaching load. Such research and publication activities contribute greatly to the reputation of the faculty and the university in general. However, the faculty struggles to balance the demands of writing grant proposals; conducting research; writing, submitting, and revising scholarly publications; advising and mentoring students; and performing essential service for the university while teaching a six-course load.”

The university’s appreciation and understanding of the benefits of scholarship to effective instruction has increased over the past decades. However, the time available for this activity has decreased as other demands on faculty have increased. Scholarly activities have become a pressured and uncompensated pursuit of summers and semester breaks, which inhibit considered preparation for teaching in the following semester, or time for scholarship must be “stolen” from time needed for teaching. The present load is felt to be debilitating by many members of the Bucknell faculty, given the difficulty of sustaining a program of scholarship during the academic year over and above the six-course teaching load. An institution with high standards of scholarly productivity must support the scholarly activities of its faculty, both to enable junior faculty members to establish a program of research and scholarship early in their career and to encourage tenured faculty to remain committed to their scholarly programs and to continue to contribute to the state of knowledge in their fields. A five-course load will make members of the Bucknell faculty better able to conduct themselves at the level of excellence that is expected of them.

The options for course-load reduction considered and the recommendation made by the CSP are based on the explicit assumption of no expectation of increased scholarship but rather on an improved balance between teaching and scholarship. The objective is to generate a more reasonable balance between teaching and scholarship – given that scholarship is forced to the margins when teaching takes so much time.

### Risks associated with course-load reduction

There are risks associated with course-load reduction, including curricular losses (i.e., loss of elective courses, loss of sections from introductory courses), increase in mean class size due to the loss of courses and sections, and decreased faculty availability. Bucknell will need to formulate clear expectations of faculty work, availability, and presence on campus if it moves to a five-course load. It has been the experience of some campuses that the transition to a reduced course load has exacerbated the tendency of some faculty to consolidate their teaching in order to keep some days free for off-campus activities.

Bucknell must assure that all departments and programs have a comparable ability to introduce the five-course load and still cover the central curriculum. Similarly Bucknell must assure that this transition does not reduce the ability or willingness of faculty to contribute to general education and interdisciplinary teaching. The university must preserve appropriate balance between upper-level and lower-level courses, and the balance between specialized disciplinary courses and all-university teaching. Bucknell must make every effort to ensure equitable institution of course-load reduction among faculty. Bucknell must communicate clearly that the university is NOT contemplating an upward shift in the scholarly expectations associated with reappointment, tenure, or promotion.

The following four tables outline the major strengths and weaknesses of the four most viable options among the options discussed by the CSP. Also included for each option are important practical considerations associated with a given option. There are substantial costs associated with each option and the benefits of the options vary. The CSP discussions resulted in a clear recommendation, which follows the four options. Finally the CSP provides a rough estimate of the annual cost of its recommendation.

Options for Reducing Course Load (**originally presented in the fall of 2002**)

Option	Strengths	Weaknesses	Practical Considerations
(1) <u>Reduction to five-course annual load</u> with enough added faculty to protect curricular and class-size advantages.	<p>Increased interactions with students outside the classroom.</p> <p>Benefit accrues during the academic year, to provide time for improving teaching and pedagogy when teaching occurs.</p> <p>Provides opportunity to strengthen parts of the curriculum – through allocation of new faculty lines.</p> <p>Easy to understand to an audience outside Bucknell as well as on campus.</p> <p>Aids in recruitment and retention of faculty.</p> <p>Better enable faculty to conduct itself at the level of teaching and scholarly excellence that is expected of them.</p> <p>Make more faculty time available to participate in college-wide and university-wide service that would enhance the undergraduate experience.</p> <p>Enhances morale.</p> <p>Endorsed by a majority of departments and programs.</p>	<p>Advantages to students are less obvious than other options – must work to make advantages occur.</p> <p>Faculty could become less available to students if faculty cluster teaching on fewer days and spend more time off campus.</p> <p>Course caps will have to increase – potentially a 10% increase in average course enrollments.</p> <p>Beneficial impacts to departments, programs, and faculty members will vary since not every department or program will gain staff.</p>	<p>Requires new faculty positions. Preliminary estimates based on the Committee’s “3-2 Teaching Load Survey” indicate that this option is workable with roughly 19-20 new faculty positions along with associated office and/or laboratory space needs. <b>[This estimate has been superceded by a more recent survey which estimates that a total of 36 new faculty lines will be needed.]</b></p> <p>All current teaching releases will need to be reconsidered to reclaim approximately 50% of released courses. <b>[This percentage is based on the original estimate of 20 new faculty positions.]</b> Fewer course releases would add to the teaching pool to mitigate curricular losses.</p> <p>Faculty members would be able to teach fewer elective upper-level courses and fewer courses with six or fewer students.</p> <p>Must actively work to develop ways to ascertain whether five-course load is increasing faculty availability to students outside the classroom, enhancing faculty commitment to</p>

Option	Strengths	Weaknesses	Practical Considerations
			<p>students, and improving pedagogy.</p> <p>Need to balance course offerings across semesters.</p> <p>Temporary replacement faculty would teach a six-course load given no advising, no participation in the governance process, and lower scholarly expectations.</p>

Option	Strengths	Weaknesses	Practical Considerations
(2) <u>Move to smaller section sizes</u> with enough added faculty to protect curricular and class-size advantages but with no reduction in annual course load.	<p>Smaller section sizes, which reduces the load per course.</p> <p>Increases teaching effectiveness in each class.</p> <p>Helps students more than faculty.</p> <p>Can be implemented stepwise.</p>	<p>An expensive option given the return – even with as many new faculty lines as option #1, it would decrease average class size by only 2 students. Thirty new faculty lines would produce only a 10% mean class-size reduction and new lines can't be distributed equally across campus.</p> <p>Less value to faculty than moving to a five-course annual load.</p> <p>Does not relieve the fixed-costs of teaching associated with a class of any size – i.e., lecture time, class and examination preparations.</p> <p>Value to faculty differs by department or program.</p> <p>Less obvious advantage for recruitment given that candidates are less aware of class size as a</p>	<p>Same issues regarding staffing as option #1.</p> <p>Bucknell would adopt reduced class-size caps.</p> <p>Faculty would be expected to revise pedagogy to benefit students if the realized class-size reduction for a given course is meaningful.</p>

Option	Strengths	Weaknesses	Practical Considerations
<p>3) <u>More frequent paid sabbatical leaves</u> with enough added faculty to protect curricular and class-size advantages but with no reduction in annual course load. For example, a 4- or 5-year cycle (i.e., one semester leave after six semesters of teaching).</p>	<p>Appreciably increases the time available for focused research and course development.</p> <p>It clearly benefits recruitment.</p> <p>Some curricular enhancements and addition of faculty lines may be possible if new faculty positions were made available via permanent sabbatical-replacement positions.</p> <p>Simple to institute, lower salary costs of replacement faculty saves money.</p>	<p>recruitment issue.</p> <p>Increased time is available when faculty member is <u>NOT</u> teaching – negating most benefits of load reduction to students.</p> <p>Does not make more time available for student mentoring and advising.</p> <p>Relies on less-well prepared instructors when temporary replacement faculty is hired.</p> <p>Dangers to common curricular efforts (e.g., Foundation Seminars, Capstones) – temporary staff does not often teach such courses – this option would shift more work to fewer tenured faculty given sabbatical leave absences.</p> <p>More frequent disruption to curriculum and advising.</p> <p>Damages department planning, administrative planning, and university governance given that temporary faculty members do not participate in the governance process.</p> <p>Potentially fragments the faculty because of increased coming and going of faculty from leaves.</p> <p>Financial costs of recruiting and increased faculty time and energy</p>	<p>Some portion of the sabbatical leave would be devoted to activities that would benefit students or pedagogy; possibly alternating sabbatical leaves focused on research with ones directed at benefiting students.</p>



Option	Strengths	Weaknesses	Practical Considerations
		<p>spent recruiting temporary staff.</p>	
<p>(4) <u>Provide teaching credit for a wider range of activities</u> (student research, mentoring honors students, large class size, new courses) with no reduction in annual course load and with enough added faculty to protect curricular and class-size advantages.</p>	<p>Responds specifically to where instructional pressure is strongest.</p> <p>Plan can be implemented stepwise.</p>	<p>The quality of student projects may decline given the pressures to enroll independent research students in order to gain teaching credit.</p> <p>May not benefit the majority of faculty since a few departments use this approach already.</p> <p>Creates equity issues as it pits faculty members against one another to compete for students.</p> <p>Not available in many departments/programs unless additional faculty members are provided, as no course can be dropped.</p> <p>Option may effectively reduce course load without any staff additions – the consequence would be erosion of the curriculum.</p>	<p>Requires new faculty positions to protect curriculum.</p> <p>Implementation would include considerable attention to reducing inequities.</p>

## Recommendation

The CSP believes that the shift to a five-course (3-2) load provides the most benefits, and that the obstacles to its adoption, while appreciable, are surmountable. New faculty lines would be needed to offset partially the loss of elective courses, loss of sections within larger courses, and to minimize the increase in average class size. New faculty positions would be allocated to departments or programs through normal CSP procedures. Because of the need for an estimated 19-20 new faculty lines **[this number was based on an older and incomplete survey that has been replaced by a current and more comprehensive one, which estimates the need for 36 new positions]**, a transition period of 5 years or more may be necessary to move all faculty members from the current six-course load to a five-course load. This transition period may include a 5.5 course-load as an intermediate step to full implementation of the five-course load. The estimate that 19-20 new faculty lines are needed is based on the assumption that all current teaching releases will be reconsidered and that approximately 50% of released courses will be reclaimed **[This estimate was based on the need for 19-20 new faculty lines.]** Fewer course releases would add to the teaching pool to mitigate curricular losses. Implementation will require that the Committees on Instruction and Planning and Budget help to refine the goals and expectations associated with a shift to a five-course load and to see the magnitude of new resources needed for full implementation.

## Financial Implications

The financial implications of a shift to a five-course load are substantial. Costs of salaries and benefits associated with the addition of 19-20 new faculty lines are estimated to be approximately \$100,000 per year per position for a total cost of approximately \$2,000,000 per year (or approximately \$600 per student per year). Additional costs would be associated with renovation of office and laboratory spaces for new faculty as well as teaching and scholarly support for new faculty.

## Appendix 2. Five-Course Load Survey

### FIVE-COURSE LOAD PLAN SURVEY COMMITTEE ON STAFF PLANNING FALL 2004

#### I. PURPOSES

The goal of this survey is to obtain more accurate data on how converting to a five-course load plan can be best achieved. More specifically, the Committee is interested in:

1. whether departments/programs can successfully make the conversion without the addition of new faculty lines;
2. the impact the conversion could have on the offerings related to majors, electives, and CLA; and
3. how many new faculty lines are needed to successfully implement the five-course plan.

Departments/programs should consult their 2001 document that they forwarded to the Committee for background information.

#### II. ASSUMPTIONS

For purposes of this survey, assume the following (implementation of the five-course load plan might result in the modification of some of these assumptions):

1. requirements for each major do not change;
2. CLA, Engineering 100, and other service commitments by each department are maintained;
3. faculty administrative release time stays the same;
4. section enrollment caps will increase slightly; and
5. the minimum number of students required for a course to be offered will have to be raised to a number above the current minimum of six.

### III. BASIC INFORMATION ABOUT DEPARTMENTS/PROGRAMS AND THEIR OFFERINGS

Fill in the following table as best as you can.

1	2	3	4	5	6	7	8	9	10	11
Department/ Program Name	# of current FTEs <sup>[1]</sup>	# of course releases <sup>[2]</sup> measured by FTEs <sup>*</sup>	Faculty on leave not replaced (FTEs) <sup>*</sup>	Faculty on leave replaced (FTEs) <sup>*</sup>	Effective FTEs: [Col. 2- Col. 3- Col. 4]	Average # of senior majors (BA +BS) <sup>*</sup>	# of sections offered that meet the core <sup>3</sup> courses required for the major <sup>*</sup>	# of sections offered that can meet the electives required for the major <sup>*</sup>	# of sections offered to meet required CLA commit- ments <sup>*</sup>	Total # of sections offered by department (add previous 3 columns)

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<sup>1</sup> Full time equivalent (FTE) total should reflect the number of individuals (count two-thirds appointments as .67) assigned to your department/program, including tenure and nontenure track appointments. Do not count visiting appointments or temporary persons filling in for people on leave. Indicate if any of your FTEs were recently hired as a leave replacement position.

<sup>2</sup> Calculation of releases includes releases for: chairs, endowed chairs, Senior Fellows, and other administrative positions.

<sup>\*</sup> This number should reflect the average count for the last three years.

<sup>2</sup> These are specific common courses that all majors must take. If your department offers more than one major then you should combine the requirements for all of the majors in your reporting for this column and the next.

#### IV. CONVERTING TO A FIVE-COURSE LOAD

We don't expect to be able to provide each department/program with new faculty lines. We are interested in learning which departments/programs simply cannot convert to the five-course load without causing serious and unacceptable damage to their curriculum. In the 2001 survey, the overwhelming majority of departments/programs suggested that they could convert to a five-course load without adding faculty.

We anticipate that departments/programs will use some of the following devices to convert to the five-course load: eliminating some courses from their offerings; reducing the number of sections of core or introductory courses; and offering some electives in alternate years. Please submit the following:

- i) a draft copy of next year's preliminary academic course schedule or a typical schedule based on a six-course load and indicate which individuals are on leave for that year;
- ii) using the same draft copy, indicate which courses will be omitted in a five-course load scenario; and
- iii) fill in the following table as best as you can; account for labs in the usual way.

1	2	3	4	5	6
# of courses per year that can be eliminated from department/program (list # of sections per year) <sup>3</sup>	# of sections per year that can be reduced in your offerings of service or core courses <sup>4</sup>	# of sections per year that can be reduced in your electives by offering them in alternate years	Total # of sections that can be reduced per year (add previous 3 columns)	Can your department or program convert to a five-course load teaching schedule without additional faculty (yes or no)?	If you answered "no" in Col. 5, estimate # of positions the department or program would need to maintain the integrity of its major and commitments under a five-course load <sup>5</sup>

## V. USE OF NEW FACULTY LINES

Requests for additional hires are not designed to expand any area nor fill a void in any given curriculum. We anticipate, if and when new faculty lines are granted, that those lines will serve to replace courses deemed to be essential to the major or to maintain the department's commitment to the overall university curriculum.

If you anticipate asking for additional faculty lines, explain how your department/program will utilize such new hires by filling in the table below. Indicate # of sections that will be allocated to each purpose in the columns below.

1	2	3	4
# of sections that otherwise would be eliminated	# of sections in service or core courses that should be offered yearly	# of electives that should be offered yearly	Total # of sections that would be saved (add previous 3 columns)

Appendix 3. Estimated Costs of Adding 36 New Positions

Bucknell University

Finance Office

Costs to Add Faculty Positions

---DOES NOT INCLUDE NEW OFFICE SPACE---

Updated February 23, 2006

	FY08	FY09	FY10
<b>Financial Assumptions</b>			
Inflation	2.50%	2.25%	2.00%
Salary Increase	6.57%	5.20%	5.20%
Benefits Increase	3.12%	3.12%	3.12%
<b>Staffing assumptions</b>			
New Faculty Positions to Add	18	18	0
New Support Positions to Add	1.5	1.5	0
Net change Faculty	18	36	36
Net change staff	1.5	3	3
<b>Starting Salary Assumptions</b>			
Base Salary for Faculty Position	\$64,500	\$67,854	\$71,382
Benefits for Faculty Position	\$20,640	\$21,284	\$21,948
Base Salary for Support Position	\$42,436	\$44,643	\$46,964
Benefits for Support Position	\$13,580	\$14,003	\$14,440
<b>Ongoing Expenses per FTE</b>			
Technology	\$520	\$532	\$542
Professional Development	\$2,082	\$2,129	\$2,171
Other Ongoing Expenses	\$5,205	\$5,322	\$5,429
Total Ongoing Costs	\$7,807	\$7,983	\$8,142
<b>(Total ongoing costs per faculty member)</b>	<b>\$92,947</b>	<b>\$97,121</b>	<b>\$101,473</b>
<b>One-Time Expenses per FTE</b>			
Recruiting	\$5,205	\$5,322	\$5,429
Technology	\$2,082	\$2,129	\$2,171
Average Startup Expense	\$20,818	\$21,286	\$21,712
Office Furniture (Bsc Package)	\$1,561	\$1,596	\$1,628
Total One-Time Costs	\$29,666	\$30,333	\$30,940
<b>Annual Cost Increases</b>			
Faculty Wages	\$1,161,000	\$1,221,372	\$0
Faculty Benefits	\$371,520	\$383,111	\$0
Support Staff Wages	\$63,654	\$66,964	\$0
Support Staff Benefits	\$20,369	\$21,005	\$0
Ongoing Expenses	\$140,526	\$143,688	\$0
One-Time Expenses	\$533,988	\$546,003	\$0
<b>Total Annual Expense Increment</b>	<b>\$2,291,057</b>	<b>\$2,382,143</b>	<b>\$0</b>
<b>Aggregate impact</b>			
Faculty wages & benefits & expenses	\$1,673,046	\$3,496,343	\$3,653,019
Staff wages & benefits	\$84,023	\$175,938	\$184,213
One-Time Expenses	\$533,988	\$546,003	\$0
<b>Net budget impact</b>	<b>\$2,291,057</b>	<b>\$4,218,283</b>	<b>\$3,837,231</b>