

MEMORANDUM

TO: Faculty Leadership in Environment (FLIE)

FROM: Bruce Frayne, Dean, Faculty of Environment

RE: **Draft Recommendations for Course Releases and Buyouts in the Faculty of Environment**

DATE: January 25, 2024

Members of the Faculty Leadership in Environment (FLIE) group are:

Bruce Frayne, Dean, Faculty of Environment (Chair)
Christine Barbeau, Associate Dean Teaching
Johanna Wandel, Associate Dean Undergraduate Studies
Michael Wood, Associate Dean Work Integrated Learning (WIL)
Peter Deadman, Associate Dean Graduate Studies
Prateep Nayak, Associate Dean Equity, Diversity, Inclusion and Justice (EDIJ)
Rob de Loë, Associate Dean Research
Chris Fletcher, Chair, GEM
Katie Plaisance, Director, KI
Mark Seasons, Director, Planning
Neil Craik, Director, SEED
Derek Armitage, Director, SERS
Maryam Latifpoor-Kepearoutis, Director of Advancement
Rebecca Wickens, Director, Strategic Initiatives and Communications
Juli-Ann Perkins, Faculty Services Manager & Executive Assistant to the Dean
Tara Thompson, Faculty Executive Officer

Context

Course *releases* are reductions in the teaching load of a faculty member that are associated with appointments such as unit Chair/Director, and research chairs. Course *buyouts* are reductions in the teaching load of a faculty member that are paid for by the faculty member through funds generated from research projects.

Management of the allocation and utilization of course releases and course buyouts varies across the Faculty of Environment. This is challenging for unit Chairs and Directors, who are responsible for teaching assignments in units and who are required to manage releases/buyouts; for individual faculty

members who wish to plan for their releases/buyouts; and for the Faculty Financial Officer (FFO) in anticipating, planning and budgeting for releases/buyouts.

These guidelines establish a transparent and equitable set of rules for managing course releases and buyouts. They ensure that faculty members understand their rights and responsibilities regarding course releases/buyouts, and enable the efficient management of these by unit heads and the FFO.

University of Waterloo Policy Framework – Memorandum of Agreement (MOA) between the Faculty Association of the University of Waterloo and the University of Waterloo

As a foundational point, the MOA states in section 13.5.5 (b) that ‘the weights shall be at least 20 percent in every category, except in the case of lecturer appointments. Weight redistribution does not modify the performance quality expected in any of the three areas, though expectations for quantity will change.’ The relationship between the percentage allocated to teaching and number of courses taught is not necessarily linear, an interpretation provided for in the MOA.

In the Faculty of Environment, no faculty member shall teach less than a 20% weight in any given year. The guidelines provided below are to be read and interpreted within this guiding principle.

Guidelines Regarding Course Releases and Buyouts in Environment

- These guidelines apply to all tenure track and tenured faculty members in the professorial ranks.
- Weightings are normally distributed as follows: Teaching 40%; Research 40% and Service 20%.
- Canada Research Chairs will normally have an annual teaching weighting of 20% for the duration of the chair.
- University Research Chairs will follow the University’s stipulations, which currently provide the faculty member with the choice of either a salary stipend or one course reduction per annum, for the duration of the chair.
- Other research chairs will abide by the terms of conditions associated with those positions, but will not have a teaching weighting of less than 20%.
- Administrative appointments may result in a change in weighting and associated expectations, to reflect the terms of the appointment as agreed in writing by the Dean and Provost.
- Teaching tasks not assigned by the Chair or Director, which the faculty member has taken on as voluntary overload, or with financial compensation from an external source, are not included in the determination of the teaching weighting. Teaching that is compensated by an external source is excluded from the member’s annual performance evaluation.
- Faculty members leading major research projects may request a course *buyout* (maximum one course per year) to be paid from funds generated by the successful grant. These funds may take the form of cash from the sponsor, in the grant budget, or overhead generated by the grant. All course buyouts must first be approved in writing by the Chair/Director, and then by the Associate Dean, Research (as the Dean’s designate) or the Dean (under circumstances not related to research) at the time of application. Chairs and Directors may reject a request for a buyout based on the needs of the unit’s teaching program. The Associate Dean, Research, will not approve a request for a buyout that was rejected by a Chair/Director.
- The cost of a course buyout is currently \$18,000 per 0.5 credit course or equivalent. For Tri-Council funding, this requires a project budget of at least \$600,000 to cover one course buyout from indirect overhead paid to the university from the Tri-Council agency. Course buyouts

requested outside of Tri-Agency funding will be considered in the context of the overhead associated with those specific grants, which must be sufficient to meet the costs of the course buyout(s). In all cases, the Faculty Financial Officer will determine whether overhead (from any source) is sufficient. If a course buyout was approved based on a grant that was funded, but at a level insufficient to pay for the buyout, the course buyout can be withdrawn at the discretion of the Dean.

- No combination of course buyouts and course releases from any sources (e.g., research-related buyouts, research chairs, administrative appointments, terms of employment in offer letters) can take a faculty member whose appointment is subject to the MOA below the 20% weighting for teaching.
- Course releases and course buyouts will be allocated to a specified year and term, as agreed to by the Chair/Director and Associate Dean Research (as the Dean's designate) and must be taken in the year/term so specified. Case by case exceptions may be considered based on unforeseen circumstances that may arise (for example, illness, parental leave, etc. and for which remedies are normally provided for in policy). Faculty members are not entitled to 'bank' releases/buyouts at their discretion, and will forfeit any release/buyout not taken as planned and agreed.
- Course releases/buyouts already agreed to by the date of this memo will remain in place. However, all previously agreed to course releases and buyouts that have not yet been assigned to a specific year and term by the Chair/Director must be assigned to a year/term at the discretion of the Chair/Director no later than April 30, 2024. Course buyouts and releases that are not assigned by this date are forfeit.

In all cases, faculty members and directors/chairs in all units will work together in a reasonable way to resolve teaching commitments and schedules in ways that (1) prioritize students' education needs and the education mandate of the Faculty; (2) honour commitments made in writing by the Dean's Office; and (3) respect the weighting stipulation set out in the MOA.



Bruce Frayne