Distance Education Task Force Report
Submitted 5/13/2011

Executive Summary

The Distance Education Task Force was charged by Provost Arden to examine three specific issues:

1. The NC State tuition model, with a view to eliminating the "penalty" currently imposed when full time, on-campus students take additional hours by DE,
2. The flow of DE generated resources to colleges and departments with a view to treating the distribution of both on-campus and DE generated funds similarly, and
3. Faculty compensation for DE instruction, with a view to redefining the in-load responsibilities of faculty while ensuring those that provide additional effort are not disadvantaged.

The task force met seven times over the period March 16 to May 11, 2011. Minutes of the meetings and additional background materials are posted on the provost’s web site: http://provost.ncsu.edu/governance/task-forces/distance-education/2011/de-2011.php.

In considering the three issues in the charge, the task force strove to develop recommendations consistent with the following guiding principles:

- As demand for DE (which now accounts for approximately 10% of all student credit hours delivered by NC State) from both traditional and non-traditional students continues to grow as a part of the academic mainstream, it increasingly makes sense to reduce the differences between DE and on-campus policies and practices, both academic and fiscal. DE should be thought of more as a mode of education delivery than a category of courses or students.
- Elimination of the tuition “penalty” should be accomplished in a way that
  o is fair and equitable to all students;
  o closes loopholes for part time students who are taking advantage of inequities in the current system to pay less than their share of tuition and fees;
  o minimizes impact on current course-taking patterns; and
  o minimizes impact on tuition and fee revenues.
- Changes in the flow of DE generated resources should be structured in a manner so as to
  o simplify and streamline the management of those resources at the college and department levels;
  o retain a high level of transparency, rationality, predictability, and accountability; and
  o retain strong central infrastructure, services and funding to support the continued growth and development of quality DE programs, technology-rich courses, and “hybrid” models which can efficiently and effectively enhance student success.
- Faculty load and compensation considerations should remain as much as possible the discretion of the academic department head, guided by UNC policy and the faculty member’s SME.

Summary recommendations for each of the three charges are as follows:
1. The university should adopt a tuition and fee model that is based on the classification of the student rather than the classification of the course. Students who are enrolled in an on-campus degree program would be charged tuition and fees on the current stair-step schedule for all courses taken, both on-campus and DE. Similarly, students who are enrolled in a DE degree program would be charged on the current DE per credit hour schedule for all courses taken. NDS students who are designated “DE-only” would be charged at the DE rate and would not be allowed to register for on-campus courses. NDS students who are not designated as “DE-only” would be charged on the stair-step schedule for all courses taken.

2. The university should adopt a formulaic model for allocating enrollment change funding for both on-campus and DE enrollment. Such a model would allow more rational program planning and more predictable support for enrollment growth at the college and departmental level. Current levels of support for Flexible Access courses taken by on-campus degree seeking students should be moved to the academic departments on a continuing basis with the expectation that they will continue to provide those courses at the current enrollment levels. For other students (i.e., DE and NDS) the current Flexible Access model should be retained to provide a central mechanism to support the development and offering of new DE courses and programs. Enrollment growth funding flowing to DELTA should take into account that DELTA provides infrastructure and support services for teaching and learning with technology for all courses, both on-campus and DE.

3. The university should adopt an effort-based overload policy in lieu of the current “20% of salary” policy, and should provide annual reports with data on DE teaching and overload compensation to aid the department heads in their decision making. To provide more consistent definition of what constitutes overload responsibilities, colleges and academic departments should develop more explicit policies regarding standard faculty teaching workloads; however, ultimate responsibility for determining what constitutes overload should continue to rest with the academic department head. Teaching DE, specifically, should not convey special status in consideration of what constitutes overload; i.e., any teaching (on-campus or DE) or other faculty workload which is deemed by departmental policy and discretion of the head to be over and above the faculty member’s expected workload should be treated the same.

The task force suggests a target implementation date of Fall 2012 for each of the above recommendations.

In addition to the recommendations addressing the three charges, the task force offers an additional recommendation that the current academic policy allowing suspended students to take DE courses be reviewed. It is questionable whether this policy promotes student success and if not, it perhaps should be eliminated.
Task Force Charge #1: The NC State tuition model, with the goal of eliminating the "penalty" currently imposed when full time, on-campus students take additional hours by DE.

The attached Task Force Schedule (http://provost.ncsu.edu/governance/task-forces/distance-education/2011/documents/task-force-schedule.xls), “Tuition Disparity” tab displays examples of the tuition billing disparities currently present at NC State due to the charging of student tuition on both “stair step” (on-campus enrollment) and SCH (distance education) based tuition rates. While the charge references only “tuition” we will need to address both the “tuition” and “fees” elements of what students pay when enrolled in both on-campus and DE courses.

a) Fees – The most consistent method for assessing “fees” to students is to charge any on-campus student enrolled for less than 12 SCHs, the full student fee rate for all fees except the Education and Technology Fee (ETF).” The ETF should be charged to students enrolled in on-campus and/or DE courses on a per SCH basis. If the current stair-step tuition schedule is continued, the fee charge for ETF should be only charged to a maximum of 12 SCHs. Are there other alternatives to discuss?

b) Tuition – A critical factor to consider when resolving the tuition disparity for students enrolled in both on-campus and DE courses at the same time is the necessity to maintain revenue neutrality in the University’s operating budget. This is essential since tuition and fees currently account for 18% of the University’s total budget. While an initial simplistic approach would be to convert the on-campus “stair-step” tuition rates to those used by distance education – academic year tuition rates divided by 29.6 and 20.4 SCHs for undergraduate and graduate students, respectively – this approach would only generate the total budgeted tuition amount if the student enrollment loads do not change. However, since on-campus students today may enroll for additional on-campus SCHs in excess of 12 per semester for no additional tuition cost, it is possible that students might not enroll for more than 15 SCHs. Similarly, since the federal financial aid programs define a full time student as one enrolled for 12 SCHs, there might well be some students who choose not to enroll for more than 12 SCHs. In neither case are we able to accurately project the budget impact.

c) For task force consideration, the co-chairs suggest consideration of two possible alternatives to address the tuition disparity:

i) We could opt to recommend to the Provost that NC State “volunteer” to serve as a pilot in the University system to convert from the “stair-step” tuition rate to the SCH tuition rate schedule. To move in this direction we would have to recommend a conversion rate which would attempt to “hold harmless” the University’s tuition budget. Therefore, in calculating the appropriate SCH rates to accomplish this, we would have to attempt to determine an appropriate SCH tuition rate that uses some conversion faction that is less than the 29.6 and 20.4 rates noted above in order to generate sufficient tuition receipts to hold the University’s operating budget harmless. Since the current Distance Education resident student tuition rate is based on the 29.6 conversion faction, a different tuition rate for on-campus courses is not a realistic solution.

As noted above the attached Task Force Schedule has two tabs: the first tab, “Tuition Disparity” displays some of the disparities in the current tuition and fee billing structure. The second tab “Overload” displays the number of SCHs taken during the current academic year (2010-11) that are in excess of 15 per semester for undergrads and 10 per semester for
grads and has a “modeling” column (in yellow) in the event you want to guess at the number of these SCHs that will not be taken with a straight SCH tuition rate. Therefore, at a minimum, we will have to base any tuition recommendation on a perceived impact on the University’s total tuition receipts schedule for:

(1) students who currently enroll for more than 15 SCHs (undergrad) or 10 SCHs (grad) per semester and, under a straight SCH tuition rate will choose to enroll for fewer SCHs - ; and,
(2) students who might reduce their enrollment load to the minimum 12 SCHs to maintain eligibility for full time student financial aid consideration.

ii) We could adopt somewhat of a “hybrid” approach that changes the dynamics of the enrollment change funding formulae but maintains the current “stair-step” and SCH tuition rates for on-campus and DE enrollments, respectively. In this approach, all students enrolled in an on-campus degree program would be considered an on-campus student for all tuition charging purposes, regardless of the number of DE SCHs for which the student is enrolled. DE rates would then only be charged to students who are explicitly identified as DE students, either by being enrolled in a DE degree program or identified as a DE-only NDS student. This would necessitate at least two major changes in current enrollment management process:

(1) The university’s enrollment change funding formula would have to be changed to include all SCHs for which on-campus students are enrolled which will increase the on-campus enrollments and decrease the DE enrollments in the funding formulae.

(2) For this approach to be successful, the Provost will have to develop and use a separate allocation methodology for the on-campus DE portion of the appropriated enrollment change funding. This would be especially important in the transitional year since the net result of this change would result in a reduction in the DE enrollment funding and an additional increase in the on-campus enrollment funding.

Task Force Recommendations

Given the two options above, the task force recommends Option ii), the “hybrid” approach, rather than Option i), in which all tuition charges for regular term and DE would be on a per credit hour basis, as is currently the model for DE. The primary reasons for this recommendation are as follows:

- Option i) (i.e., per credit hour tuition for regular term and DE) will require approval from GA whereas Option ii) can be implemented at the university level, thus simplifying the process.
- If we were to pilot Option i) for the system and the other institutions failed to follow suit, we would be the lone wolf (pun intended) with per credit hour tuition.
- In Option i), the conversion of the tuition rate from the traditional "stair-step" structure method to a Semester Credit Hour (SCH) based model is unlikely to generate the same amount of tuition receipts as is currently in the University budget since an unknown
number of students who currently enroll for more than 15 SCHs (since there is no additional cost) may well limit their enrollment to 15 SCHs.

- Option ii) should have less impact on student course-taking patterns. (Note: By removing the tuition penalty, both options will drive up the demand for online courses.)
- Option ii) will eliminate the possibility of non-resident students using DE to avoid paying full out-of-state tuition.
- Option ii), we believe, will be simpler to implement within our billing and financial aid systems.

Specifically, the following rules are recommended for calculating tuition:

1. Students enrolled in an on-campus degree program will be charged tuition for all credit hours taken, to include both regular-term and DE, per the existing stair-step structure currently in place for regular term tuition.
2. Students enrolled in a DE degree program will be charged tuition for all credit hours taken, including courses delivered on campus if applicable, per the current per credit hour structure currently in place for DE tuition. (Note: This recommendation may be in conflict with a current GA rule that all students enrolled in an on-campus course must be charged at the stair-step rate, in which case an exception from GA would be required.)
3. For students who are enrolled as NDS (non-degree seeking), the following rules will apply:
   a. Students who apply and are admitted as DE NDS students will only be allowed to register for DE courses and will be charged tuition per the DE schedule (rule 2 above).
   b. Students who apply and are admitted as on-campus NDS students may take courses either on campus or through DE, and will be charged tuition per the on-campus schedule (rule 1 above).

Although fee charges are not specifically within the charge assigned to the task force, the task force recommends that DE students be allowed to opt-in on an “all or nothing” basis so that they have the option of paying the same fees assessed to on-campus students and be given the same access to campus services, such as gym, student health, etc. (For non-degree students who wish to opt-in, the task force suggests that there be a process to prevent abuse; i.e., to avoid situations in which a non-degree student enrolls in a course for the sole purpose of gaining access to university amenities.)

This recommendation is based on the fundamental assumption that DE students are, to the extent possible, treated equally to on-campus students in all respects.

**Task Force Charge #2:** The flow of DE generated resources to colleges and departments with the goal of treating the distribution of both on-campus and DE generated funds similarly.

Funds generated by DE enrollment are primarily determined by the UNC Enrollment Change Funding Formula. When the UNC funding methodology was changed by the state legislature in 1998-99, DE was included in the formula. Prior to 1998-99, DE was a self-supporting, receipts
based extension activity. The funding model adopted in 1998-99 provides new funding through a formula based on the projected increase in Student Credit Hours (SCH) taught by the institution, the academic program (CIP code) associated with each of the new SCH, the level of the course (undergraduate, masters, doctoral), and the average faculty salary for the institution. These factors are applied through what is commonly referred to as the “12-cell matrix” to convert the projected increase in SCH to a dollar amount known as the “total requirement.” The state appropriation is determined by subtracting the projected tuition revenues resulting from the increased SCH from the computed “total requirement.” For purposes of resource allocation, the “total requirement” represents the entire resource pool coming to the institution from both state appropriations and tuition receipts. (This model assumes that the actual increase in SCH realized by the institution is equal to the projected increase in SCH. Any variation from this presumed equality has problematic financial consequences. It is important to realize in the context of discussing DE resource generation and allocation that the high growth rate of DE has the side effect of high variance in actual versus projected SCH. Managing this variance is an important consideration in any viable resource allocation model.)

While since 1998-99 the funding models for supporting growth in both on-campus and DE enrollments are fundamentally the same, there are important differences:

- For on-campus enrollments, both resident and non-resident students are covered by the funding formula. For DE enrollments, non-resident students living outside of North Carolina are explicitly excluded. DE SCH delivered to these students are not reported in the projections provided to the legislature for determining the state appropriation. In other words, DE activity outside of North Carolina remains a self-supporting extension model, just as it was prior to 1998-99. (Note: NC State received permission from the General Administration to treat all non-residents outside of the funding model, regardless of their physical location.) UNC policy allows the institution to set the tuition rates for non-residents, but requires that it is at least twice the resident tuition rate.
- Summer session DE enrollments for resident students are part of the enrollment funding formula, whereas traditional summer sessions on campus are not. In other words, summer DE enrollments receive state appropriations, while traditional summer courses do not.

New funding generated by enrollment increase appears in the budget once the state budget is approved by the legislature at the beginning of each fiscal year. Once the funding arrives, it is formulaically divided into general university overhead, support for the libraries, support for OIT, and support for the academic enterprise. Since 2000, the Vice Provost for DELTA has been charged with managing the academic component of the funding. Prior to 2007, a zero-based budgeting model was employed whereby each DE program submitted a budget for the funding needed to operate the program each fiscal year. Those budgets were negotiated with the DELTA vice provost to ensure that each program had sufficient funding and that the university’s overall SCH budget would be met. The zero-based budgets included all of the college-managed DE programs, as well as the centrally managed Flexible Access program.
The zero-based budgeting model provided a very effective mechanism for ensuring that the university met its overall DE enrollment budget within fiscal resource constraints. This was extremely important in the early years due to the high year-to-year volatility of DE enrollments within individual colleges and programs. In some cases, the difference between projected and actual DE enrollments was off by more than an order of magnitude, and a strong central management structure was the only way to ensure a balanced budget. However, zero-based budgeting is inconsistent with the university’s traditional model of continuing (or “base plus change”) funding to the academic units and thus was at odds with standard budgeting processes. The most significant problem was budgeting for faculty and staff positions within the academic unit. (While this is technically possible with zero-based budgeting, it creates inconsistencies with the university’s traditional continuing budget model.)

To provide more consistency with the university’s continuing budget model, a new DE funding model was developed and implemented at the request of the provost and in consultation with the deans in 2007. The new model is a continuing budget model, which allocates funds to the colleges in direct proportion to the resources generated by their projected DE activity. The funding is governed by an MOU which provides for adjustments in the event that enrollments are over- or under-realized by the college. The Flexible Access program remained on a zero-based budgeting model to retain sufficient central management flexibility for the DELTA vice provost to ensure that the overall university DE enrollment budget was met. The formulas were structured to incentivize the growth of college-managed DE programs, while keeping Flexible Access at a lower growth trajectory but of sufficient magnitude to compensate for the variance of the continuously funded DE programs in the colleges.

![Figure 1. Growth of Flexible Access and College-managed DE programs.](image)

As Figure 1 shows, college-managed programs have grown at a greater rate than Flexible Access over the past seven years. Over the past two years, some DE programs have suffered as a result
of factors related to the economic recession, and Flexible Access was increased to balance the university’s overall DE enrollment budget.

As DE has become a large part of the university’s overall SCH delivery (DE accounts for nearly 10% of the university’s current SCH production) the differences in resource allocation strategies supporting on-campus SCH production and DE SCH production have become increasingly obvious, and have caused concerns that departmental decisions to offer courses by DE may in some cases be more motivated by fiscal issues than by student needs. The most obvious solution to this problem is to combine the resource allocation strategies in such a way as to minimize or remove the fiscal incentives to choose one mode of delivery over another. While this seems straightforward, there are a number of issues that must be considered:

- Evidence from enrollment patterns suggests that student demand for online courses is growing, and that demand exceeds supply. At the same time, there is a belief among most faculty, whether real or perceived, that teaching DE is more work than teaching a face-to-face course. A resource allocation strategy which removes incentives for DE modes of delivery would likely result in fewer DE offerings at the same time that student demands are increasing.
- Over the past decade, DE activity at NC State has grown exponentially at a rate of approximately 20% per year. This is more than an order of magnitude higher than overall NC State enrollment growth. The DE resource allocation strategy has been designed to support this high rate of growth; for example, by reinvesting a relatively large portion of the DE proceeds in new program development and providing a high level of staff support for faculty engaged in online teaching. If a high level of growth is to be continued with a unified resource allocation strategy, the model must include adequate resources to support it.
- DELTA’s mission since its founding has been to support teaching and learning with technology, both on campus and at a distance. Most of the infrastructure and support that DELTA provides supports on-campus or “mixed mode” classes, while the fiscal resources come almost entirely from DE. A unified resource allocation model must balance the fiscal loading to reflect the workload balance.

Task Force Recommendations

The task force members were in unanimous agreement that a unified model should look more like the current, formula-based, DE program funding model than the traditional on-campus resource allocation model. Task force members described the DE allocation formula as “transparent, rational, and predictable.” Basically, knowing in advance the specific resources that will come with new enrollments generated by a new or expanded program allows for rational planning of those programs.

A concern raised by some task force members whose departments are heavily engaged in Flexible Access was that those funds should be allocated on a continuing basis to facilitate
budgeting for faculty and staff positions. It must be understood that moving the Flexible Access funds to the department on a continuing basis will shift the burden of ensuring that those credit hours are delivered from the central administration (i.e., DELTA) to the department receiving the funds, and that the department also bears the burden of future budget cuts against those funds.

Specifically, the task force offers the following recommendations for enrollment change funding allocation:

1. The university should adopt a formulaic model for allocating the academic portion of the enrollment change funding. The model should have the following properties:
   a. Transparent. The formula should be spelled out in an MOU between the provost and the deans.
   b. Rational. The formula should be fiscally sound and sustainable. As such, it must recognize the differences by discipline and level in funding coming into the university to support enrollment growth (currently defined by the “12-cell matrix”) and ensure an overall balanced revenue/cost structure. It should:
      i. Allocate a majority of the enrollment funding to the academic colleges on a continuing basis;
      ii. Include a provision for continuing budget reduction if projected enrollments in a college decrease;
      iii. Retain a portion of the enrollment funding centrally to be allocated on a one-time basis each year to serve as a “smoothing function” to ensure that the university meets its overall enrollment commitment; and
      iv. Reserve an adequate percentage of the enrollment growth funding to support the proportional growth of central academic support infrastructure and staff support resources. Central academic support organizations whose cost (workload and infrastructure costs) grow in proportion to enrollment (e.g., DELTA, Disability Services, etc.) should be included in the formulaic allocation. (This model is consistent with funding academic support units such as the Libraries and OIT, which receive a formulaic allocation from enrollment increase funding.)
      For example, the formula might specify that 65% of enrollment increase funding be allocated directly to the colleges in direct proportion to their respective contributions to the enrollment increase, 5% to be retained centrally for one-time allocations, and 30% retained for centrally managed academic support.
   c. Predictable. The formula and accompanying MOU should be a reasonable guarantee of the resources that a college can expect when planning a new program or growing an existing program. Similarly, for programs that may be discontinued or reduced in size, it should provide a predictable indicator of the resources that will be lost to the college as a result.
d. Accountable. The enrollment funding MOU must include clear and enforceable mutual accountability provisions to ensure that university’s enrollment targets are met. (The current MOU on Formula-based Funding for Distance Education Programs is provided as an example.)

2. A majority of the funding that is now provided on an annual basis for Flexible Access enrollments should be moved to a continuing funding model. Specifically, the task force recommends that the portion of Flexible Access funds which represent students enrolled in degree programs should be moved on a continuing basis to the academic units responsible for the courses. The receiving units would be responsible for managing the funds to continue the delivery of the online courses to that student population. Base budgets would be established based on current levels of Flexible Access funding and enrollments. Funding for future enrollment growth or shrinkage would be governed by the formulaic model specified in item 1 above. For non-degree seeking students, the current Flexible Access model should be retained.

3. The enrollment funding flowing to DELTA should reflect the following:
   a. Much of the infrastructure and support provided by DELTA is utilized by the majority of NC State courses, both DE and non-DE. While this infrastructure and support has been largely paid for with DE funds, a unified resource allocation formula must equitably draw from both DE and non-DE income streams.
   b. In the proposed tuition model, the distinction between “DE” and “web based” courses disappears. A rational formula must consider that these become largely indistinguishable from a support standpoint.
   c. To sustain the current high growth trajectory of DE programs and online and technology rich courses, adequate funds must be retained centrally to support new course and program development, along with faculty consultation and training.

These recommendations represent a model and a set of principles that the task force believes would provide a needed linkage between enrollment growth and resource allocation that would improve the overall ability of the university (to include the colleges, departments, and central support units) to manage and support enrollment growth. Implementation of this model will require more detailed study to establish the formula parameters. The task force recommends that the detailed formula parameters and accompanying MOU be developed over the next year, with the goal of implementation beginning FY 2012-13.

**Task Force Charge #3:** Faculty compensation for DE instruction, with a view to redefining the in-load responsibilities of faculty while ensuring those that provide additional effort are not disadvantaged.

The fact that many faculty view Distance Education as an overload responsibility stems from the fact that for most of the university’s history it was a self-supporting extension activity intended to provide educational opportunities exclusively to non-traditional adult learners. The Colleges of Engineering’s and Textiles’ Distance Education programs date back to the 1970’s. Prior to 2000, other NC State colleges offered DE courses through the McKimmon Center as an
extension activity. When DELTA was formed in 2000, the group that was supporting the offering of DE courses through McKimmon was combined with the Video Communications Service unit from the College of Engineering and the Learning Technologies Service which resided in the Libraries to form Distance Education and Learning Technology Applications (DELTA). Although DE has moved over the past 12 years from an extension-based program to a mainstream academic activity under the Provost, with similar state support as on-campus programs, the faculty in many colleges and departments still view teaching DE as outside of their traditional teaching responsibilities and expect additional compensation as a result.

Some studies indicate that compensation is an important factor in a faculty member’s willingness to teach DE. Green, Alejandro and Brown (The International Review of Research in Open and Distance Learning, 10(3), 2009) stated that:

>Seldom will faculty participate in activities that take time and resources away from furthering their careers, especially when trying to get tenured at an institution. Schifter (2000b) found that faculty compensation is an important factor in faculty motivation. Full-time instructors who participate in distance education are sometimes compensated with release time, overload pay, new computer or laptop, travel funds, or access to a teaching assistant.

**UNC Policy**

The UNC Policy Manual 400.1.1.2[G] states the policy for compensating faculty teaching Distance Education as follows:

[G.4.c] Full-time faculty members may teach courses in distance education programs as a part of their regular load. However, if instead they teach such courses on an overload basis, they shall be limited to no more than one additional course per semester in addition to their regular full-time, on-campus teaching load.

**NCSU Policy**

NCSU POL 05.15.3 “Non-Salary and Deferred Compensation” does not distinguish between Distance Education and other sources of overload compensation, setting the limit from all sources of overload compensation at 20% of the faculty member’s annual base salary unless explicitly approved by the Chancellor, Dean, or Provost:

[POL 05.15.3, 4.8.3] Compensation paid from NC State University-associated entities to faculty who teach in executive education or comparable programs is authorized by this policy. Payments in excess of 20% of the faculty member’s annual base salary – from all sources including supplemental or overload pay that is subject to the 20% overload limit -- must be approved on a case-by-case basis by the Chancellor, on recommendation of the Dean and Provost.

**Faculty Teaching Loads**
A draft report entitled *A Report on Faculty Teaching Workload Covering the Years 2000 to 2009* was issued by UNCGA on October 10, 2010. The report analyzes the faculty teaching loads for UNC system institutions based on the widely adopted Delaware methodology. The report found that overall UNC teaching load averages are slightly higher than the overall average for institutions participating in the Delaware study. In 2010, UNC institutions overall averaged 20.32 students per section, 287.69 SCHs per instructor, and 105.32 students per instructor. NCSU teaching loads overall were above the national comparison for our Carnegie class, with 81% of our degree programs meeting the standard. (There were a number anomalies identified in the data for the draft report which may change this number by a small amount.) Over the period 2006-2009, the institutional average for NCSU was 2.71 organized sections and labs per FTE faculty.

The UNC Policy Manual 400.3.4 states that annual course loads for Research Universities I (i.e., UNC-CH and NCSU) should be no lower than four. The policy states that the assignment of faculty duties is a fundamental responsibility of department chairs and deans, and provides them substantial latitude in making faculty teaching assignments.

An informal study undertaken by Tom Miller in 2005 analyzed NCSU teaching loads for faculty teaching DE both in-load and overload and obtaining total SCH production from Registration and Records data. The analysis did not take into account faculty classification, number of sections taught, research release, or other factors related to teaching load. The findings (as measured by SCHs produced per instructor) were as follows:

- Instructors who teach Flexible Access courses on an overload basis have, on average, 87% higher in-load teaching loads than instructors who teach no DE at all.
- Instructors who teach Flexible Access courses in-load only have, on average, 20% lower teaching loads than instructors who teach no DE at all.
- Instructors who teach DE in general have, on average, 16% higher on-campus and 57% higher total teaching loads as compared to instructors who teach no DE at all.

**AAUP Sample Policy and Contract Language**

The American Association of University Professors (AAUP) has developed sample policy and contract language related to faculty workload and compensation for Distance Education instruction. The sample wording on compensation is reproduced below:

*Compensation. Courses taught via distance education may be included as part of the faculty member's regular load, or may constitute an overload, or a combination of both. The teaching responsibilities as they relate to assignments, scheduling, syllabi, papers and tests, shall be no different from those of the corresponding traditional course sections. Grades will be issued using the normal University procedures.*

*Faculty members teaching a course utilizing distance education technology for the first time shall be provided course load reductions to properly prepare the course. This*
reduction should be provided prior to the offering of the course, and may be supplemented with an additional reduction during the first term the course is taught. Acceptance of these reductions constitutes agreement to teach two additional sections of the course over the next three terms. However, if after the course has been taught for the first time the administration or the department deems (for academic, financial, or other reasons) that it is not viable/practicable to teach it again using the distance education format, the faculty member shall be relieved of this obligation.

Faculty members shall not be required to travel to distance education offcampus sites. If the faculty member deems it appropriate to visit an offcampus site, the faculty member will receive reimbursement for travel at the normal University rates.

In the event that the institution makes any modifications to the distance education course(s) and/or delivery systems which increase or substantially alter the faculty member’s workload, the university shall be required to notify the union at least forty-five (45) days prior to the effective date of the modifications, in order to negotiate with the union over increased compensation and workload.

Variations among NCSU colleges and academic departments

There are large variations among college- and department-level policies regarding faculty teaching load and overload compensation. Similarly there are colleges (e.g., Engineering) where there is little or no overlap between on-campus and DE students, while in other colleges the overlap is significant, with students enrolled in on-campus degree programs representing 70% or more of the population of the average DE course. In general, neither the instructor nor the department head has knowledge of the percentage of on-campus students in a given DE course unless on-campus student enrollments are prohibited by departmental policy. Some departments (e.g., Biology and Sociology) forbid faculty to teach DE on an overload basis, others allow faculty to choose to teach DE in-load or overload, and some (e.g., Engineering departments) view overload compensation for DE as standard practice.

Task Force Recommendations

1. NCSU academic departments should develop more explicit policies regarding standard faculty teaching workloads to provide more consistent definition of what constitutes overload responsibilities. Teaching DE, specifically, should not convey special status in consideration of what constitutes overload; i.e., any teaching (on-campus or DE) or other faculty workload which is deemed by departmental policy and discretion of the head to be over and above the faculty member’s expected workload should be treated the same.

2. NCSU should adopt an effort-based overload policy in lieu of the current policy of 20% of salary. The policy should be consistent with the intent of the UNC policy which limits overload teaching to course per term, but generalized to a recommendation of no more
than 25% total overload effort, subject to the discretion of the department head. Per recommendation 1 above, the task force suggests that this guideline be applied to all activity deemed to be overload, not limited to DE specifically.

3. DELTA and/or Registration and Records should provide annual reports to each college and academic department profiling the student populations in each DE section, thereby enabling department heads to make more informed decisions on overload compensation. (A possible consideration might be to exclude the teaching of students who are enrolled in an on-campus degree program from the overload teaching calculation.)

4. DELTA should provide annual reports on DE overload compensation in all academic departments to facilitate college and university oversight on DE in-load and overload offerings.

Additional Task Force Recommendations (not specifically within the scope of the charge)

The task force recommends that the current policy allowing suspended students to take DE courses should be reviewed. We feel that this is not a good policy, as it does not promote student success and probably should be eliminated.