Establishing criteria for measuring faculty members’ workload

Hamideh Reshadatjo¹, Saeed Zarein-Dolab², Houssain Farahinee³,

Abstract

Purpose: This article presents the results of a study aimed at devising comprehensive, standard and objective criteria for measuring faculty members’ workload.

Material and method: The indicators for measuring faculty members’ workload were collected through a comprehensive review of the literature, a survey of the available documents and methods for measuring workload in the country, and interviews with health authorities and faculty members. In all, 81 indicators were identified which fell under 5 categories: instruction; research; consultancy and academic services; administrative and managerial services; and personal and professional development.

A questionnaire using these 81 indicators was designed and randomly mailed to 120 faculty members of Iran University of Medical Sciences and Health Services working in six faculties. They were asked to rate each question using a seven scale response, from complete disagreement to complete agreement. 98 faculty members responded, that is, 15% of all the faculty members of the university. All the indicators were ranked according to the scores received in the questionnaires.

Results: 81 indicators were identified and weighted. The faculty members suggested

¹ Lecturer of Medical Education in Iran UMSHS.
² Assistant Professor of Teaching English as a Foreign Language (TEFL) in Shaheed Beheshti UMSHS.
³ Assistant Professor of Orthopedics in Iran UMSHS.
that 25 more indicators needed to be added to the list. The category of instruction, with 32 indicators, was regarded as the most important category. Teaching a new course, preparation time for class and number of students in the class, were considered to be as important as the other instructional indicators. The weighting given to each indicator was influenced by the specialty of the rater. Faculty members believe the workload data should be reported by themselves preferably at the end of every academic year or semester.

Discussion and conclusion: The criteria and the guidelines suggested in this study might be useful for evaluation, accreditation, ranking, promotion, tenure decisions, policy making and improving the quality of education in medical universities.

Each department or faculty needs to have their own specific indicators weighted by their faculty members. This provides consistency and stability in workload data collection. The indicators for professional development also need to be considered in measuring faculty workload.

Keywords workload, faculty member, medical.

Introduction

An appropriate and accurate measurement of faculty members' workload will be of benefit to the universities. It provides the grounds for the university authorities to decide on a fair allocation of resources among faculty members, to establish a sound system for professional and financial rewards and incentives and to design strategic planning. Such a measurement may not be possible unless standard, consistent, objective and measurable indicators of faculty members' workload are identified and prioritized (Reshadtajo 2001).

There are two predominant methods used for measuring workload: the activity reporting and the equivalence report (Jordan 1994). In the activity reporting method, faculty members report the time they have spent on each specific indicator provided by the university. Thus, similar to a questionnaire, against each indicator, faculty members write down the time spent on that during a week or a month.

The equivalence report is based on weighting the activities employing a credit hour standard to the institution. Thus one hour of teaching may be regarded as three credits and one hour of supervision as one credit. The sum of all the credits the faculty member receives is regarded as his/her workload measurement (Jordan 1994). However Jordan does not show how an institution decides on the amount of credits or weight for each indicator.

Archer (1974), while supporting the weighting formulae for measuring workload, states that the classification of faculty members workload would depend on which formula was used. Thus Archer suggests that the feasibility of the formulae should be determined.

Byrd (1994) argues that since the amount of time allocated to each indicator depends on the goal and the mission of the institute, the weighting system used for measuring faculty members workload should also be defined based on the goal and the mission of the institute. Byrd suggests that departments should be regarded as the unit of reporting, not the individual faculty member.

Meyer (1998) criticizing equating teaching with managerial and administrative
responsibilities, suggests that workload studies should be focusing on students’ learning, defining outputs, clarifying curricula and missions, realizing the potential of technology, realigning rewards for research and teaching, and encouraging new leaders and fresh ideas. Mancing (1994) also suggests that workload should be considered in the context of institutional mission and workload standards.

Shaheed Beheshti University of Medical Sciences and Health Services (UMSH) embraces a more encompassing definition of faculty members’ workload so that a variety of different indicators are considered for measuring workload. In mid 2001, the advisory committee of Shaheed Beheshti UMSHS approved the faculty members’ workload equivalent report plan. In that, 12 indicators under three components: education, research and service were identified and weighted. Each component and indicator was clearly defined. The indicators were further divided into more detailed sub-indicators. The basis for the weighting system, however, is not very clear and also similar weighting is given to all departments.

Iran UMSHS follows a self-report method which is then analyzed and weighted by certain faculty members appointed by the Vice Chancellor for Education. Each indicator receives a credit. The sum of the credits for teaching is regarded to be 13, for professional development 7, for research activities and publications 20, for managerial services 5. The faculty members are also evaluated by the students and the head of the department for the quality of the educational services they are providing. 35 credits is assigned to students’ opinions and 25 for the head of the department. Iran UMSHS probably is the only university that assigns credit to the quality of education.

The present study was devised to establish more comprehensive and detailed indicators that need to be taken into account when measuring workload in order to ascertain with greater accuracy nature of the tasks involved. In addition, the study was set up to determine the type of weighting which should be given to each indicator.

Method
This is a descriptive study conducted in six faculties of Iran UMSHS. A questionnaire was designed incorporating the indicators identified as relevant and the faculty members were asked to express their degree of agreement about each indicator through the use of a seven-scale response ranging from complete agreement to complete disagreement.

The indicators were collected in four stages. Stage one was a comparative review of the literature for identifying the criteria for indicators. The indicators were collected from the workload studies conducted in other universities such as Kent University (Greer & Myron) Pennsylvania State University’s Behrend College (Shull 1984), Shaheed Beheshti UMSHS’s internal report, Iran UMSHS’s internal report, the documents in the Iranian Ministry Of Health, Treatment and Medical Education.

Stage two consisted of interviewing certain academic members in Shaheed Beheshti UMSHS, Iran UMSHS and certain authorities in the ministry and seeking their opinions regarding which indicators should be used for evaluating workload. While the interviewees approved the indicators from
the first stage, they recommended that 15 indicators be added to the list.

In stage three, the 81 indicators derived from the previous two stages were classified and organized in a questionnaire format.

Stage four was testing the validity and reliability of the questionnaire. The validity of the questionnaire was tested by ten experts in education and medical education. The reliability of the questionnaire was checked by using the alpha Kronbach test.

The questionnaires were mailed to 120 members of the 629 faculty members of Iran USMSH, randomly selected from six faculties. 98 faculty members responded. The participants recorded their response to the indicators. The participants were asked to indicate whether the question (indicator) was irrelevant. The participants were also asked to add any indicator that was missing in the questionnaire.

Since the weighting given to each indicator might change from field to field, the respondents were allocated to three groups: 57 clinicians, 15 non-clinicians and 26 technicians. Clinicians were defined as those who were involved in the teaching of clinical courses in the hospitals. Non-clinicians were those who taught basic sciences and management. The technicians were defined as those who worked in the laboratories, nurses, obstetrics, physiotherapists, and so on.

Data analysis
In order to prioritize the indicators and make the comparison between them easier, the data were changed into percentages using the following procedure. Since each indicator was graded based on scale of seven, the sum of the numbers assigned to each indicator is regarded as the score for that indicator. The score of an indicator is divided by its highest score which is calculated by the number of participants multiplied by seven, since seven is the highest number one can mark for an indicator. The result then is multiplied 100.

\[
\text{Sum of the scores} \times 100 \\
\text{Number of participants} \times 7
\]

Results
There are 81 indicators classified under 5 categories: instruction; research; consultancy and academic services; administrative and managerial services; and personal and professional development.

Instruction. The weighting given to instruction at different stages from undergraduate to post graduate is as follows:

- Clinical specialty: 85
- Ph.D.: 76
- General practice (Undergraduate): 74
- Master of Science: 72
- Bachelor of Science: 65
- University diploma: 48

The clinicians weighted the relevant teaching indicators as follow:

- Teaching in the hospital: 90
- Teaching in the clinical rounds: 88
- Teaching in the morning reports: 84
- Journal club: 83
- Teaching in the operating room: 77
- Teaching in the procedure room: 75
- C.P.C. conferences: 72
- Mortality conferences: 68
All three groups weighted the relevant theoretical teaching indicators as shown in table 1.

As shown in table 1, Clinicians have weighted clinical teaching much higher than non-clinicians and have weighted the laboratory courses much lower than the weighting given to these by the technicians.

<table>
<thead>
<tr>
<th>Type of Teaching</th>
<th>C</th>
<th>NC</th>
<th>T</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical courses</td>
<td>93</td>
<td>31</td>
<td>90</td>
<td>93</td>
</tr>
<tr>
<td>Main courses</td>
<td>84</td>
<td>90</td>
<td>96</td>
<td>89</td>
</tr>
<tr>
<td>Managing the educational fields</td>
<td>75</td>
<td>66</td>
<td>75</td>
<td>80</td>
</tr>
<tr>
<td>Laboratory courses</td>
<td>38</td>
<td>53</td>
<td>60</td>
<td>73</td>
</tr>
<tr>
<td>General courses</td>
<td>55</td>
<td>75</td>
<td>55</td>
<td>64</td>
</tr>
<tr>
<td>Teaching one student</td>
<td>46</td>
<td>57</td>
<td>55</td>
<td>60</td>
</tr>
</tbody>
</table>

Table 1. Comparison between the three groups. C stands for clinical, NC non-clinical and T for technical.

The participants recommended that certain indicators (in the space provided for them in the questionnaire) needed to be prioritized and considered in workload studies. They are as follows:

Teaching in the workshops for faculty members
Designing and conducting workshops for faculty members
Teaching in post specialty or fellowship
Teaching the public/community

Research. The second category, which consists of seven indicators was weighted as follows:

Authorship of a book 93
Publishing articles 92
Main researcher of accepted research proposals 91
Translation and authorship of a book 85
Translation of a book 81
Co-researcher 79
Research consultant 76

The other indicators recommended by the participants are:

Peer review of research proposals
Peer review of books
Peer review of articles
Editor of a journal
Director of a conference
Review articles
Case reports
Editorial board

Consultancy and academic services. There are 13 indicators related to consultancies and academic services which were weighted as follow:
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Presentation 88
Consultant on university projects 82
Consultant for special educational workshops 81
Consultant for projects outside the university 75
Consultant for team work students' projects 74
Community consultant 73
Consultant for students in the community 73
Consultant for students' projects 72
Consultant for graduates 64
Consultant in technical affairs, maintaining students' records 63
Consultant for students in their general affairs 60
Free consultancy and general academic services 60
Recommendations 53

The eight indicators recommended by the participants are as follow:

Membership of the evaluation committee of the ministry
Membership of the higher council of curriculum development
International presentation of papers
Presentations in seminars
Poster presentation in seminars
WHO consultant
UNICEF consultant

Administrative and managerial services. There are 13 indicators in this category which are as follow:

Chancellor of the university 89
Vice chancellor 87
Dean of the school 87
Dean associate 84
Managers 83
Hospital director 82
Administrative manager 80

Hospital associate director 78
Head nurses 76
Head of the educational department 75
Head of the ward 74
Membership in the committees 68
The recommended indicators are as follow:

Membership in university educational council
Membership in faculty educational council
Membership in university research committee
Head of a clinic
Membership in faculty research committee
Production editor

Personal and Professional development. The indicators are as follow:

Innovations 89
Critics of journals, research proposals and reports 88
Inventions 88
Study in a special area or subject 87
Discoveries 87
Membership of a scientific society 83
Participation in professional and technical meetings 82
Participation in educational workshops 79

The participants weighted the five categories as follow:

Teaching 95
Research 85
Professional development 83
Academic consultant 75
Administrative and managerial services 69

The participants' views regarding a proper time for measuring workload were as follow:

At the end of academic semester 77
At the end of academic year 75
Conclusion

The fact that clinicians weighted laboratory courses much lower than technicians suggests that the weight given to each indicator depends on the field and specialty of the rater. Thus it is suggested that the indicators should be weighted at the level of each department or faculty. The comparison between the workload data obtained from one department with another department may not be realistic unless each indicator is weighted by the faculty members of that department. This will result in providing stable and fixed criteria for measuring the workload of that department or school. Therefore it can be concluded that it would be less effective if general indicators with the same level of priorities were used for evaluating and comparing all faculty members’ workload.

It should, however, be pointed out that as Jordan (1994) states the mission or the goal of the faculty is another, important factor that should be considered when the indicators are to be weighted. The weight assigned to each indicator needs to reflect the mission of the institute as well. For example, in Iran, the main mission of medical schools is to educate GPs (Marandy 2001) and thus teaching medicine is in the top priority of all medical schools.

Faculty care more about the postgraduate students than the undergraduates. This is consistent with other studies (Layzell 1992). It should, however, be noted that the undergraduates are at the earlier stages of their studies and need more motivation and more contact with experts in the field. Thus it is recommended that they should not be deprived of good education.

While most studies indicate that instruction, research and managerial services are the major priorities, the present study suggests that instruction, research and then professional development are ranked as priorities. This might be because of the poor perception regarding managerial services and the importance given to professional development by Iranians.

The results suggest that noninstructional time is as important as instructional time and the amount of time and effort involved in teaching a three-credit course may be different from another three-credit course. Discipline and course level are important in evaluating faculty workload.

The list of indicators provided in the present article suggests that faculty workload should be measured based on very detailed and specific indicators. This not only will provide the basis for considering all aspects of the workload of a faculty member, but also will make the comparison between different faculties easier and more consistent.

Acknowledgement:
The authors would like to thank Dr. Naderghole Ghorchian for his keen cooperation and supervision of the thesis, under the same title, submitted for MMEd degree in Shaheed Beheshti UMSHS.

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