Instructions for Completing the Course Assignment Inventory Worksheet

It is important that this tool be useful to both the department and the college. Please try to fill it out accurately and completely. Before beginning, review these instructions for background information and for definitions of the course reduction categories, as well as information about submitting special assignment recommendations.

Important: Do not fill out the top portion of the document (rows 1-7). These sections are auto-populated as the information is added for individual faculty members in the sections below.

- **Base Load**

  - Review the list of faculty members for accuracy. In January 2020, when the Course Inventories are created for FY21, the names of Tenure Track Faculty are populated based on information available in BuckIQ, table FAB100. You can update the faculty names on your own in column A. If you need assistance, please send an email to Liana Crisan-Vandeborne.1@osu.edu. If the changes are inconsistent with the information in BuckIQ, Liana will encourage you to work with your divisional Human Resource Manager to make corrections there as well.

  - Review the FTE and base load (columns B and C) for each of your faculty members. If a faculty member has a contractual split appointment, ensure that the correct appointment, for your department, is listed for them and that his or her base load accurately reflects that appointment (e.g., for a 50 percent appointment, the base load is listed at two instead of four for 100 percent FTE, etc.).

  - Review base loads for any faculty who have an ongoing permanent or term course reduction related to their faculty position (e.g., Ohio Eminent Scholar, special hiring agreement, etc.). If faculty are receiving reductions for other reasons (e.g., faculty start-up, FPL/FMLA, short-term retention/offer letter reductions, or reductions for administrative responsibilities), the base load listed should be the standard load in the unit, with reductions then taken as detailed below.

- **Reductions/Additions**

  - For columns D and F, utilize the drop down boxes in those sections; this is necessary for the formulas in the document. In Column D, select the category for a course reduction. Individual faculty members can have course reductions in more than one category, but each one must be listed on a separate line.

  - In Column E, list a numeric value for the course reduction on the corresponding row.

- In Column F, select the category for any additional planned courses over the base load. Examples for these categories include: Reduced Research or Service Assignment for those who teach over the standard base load, in exchange for a reduction in research or service; Course Owed from Previous Year to reflect those that "owe" a course from a prior year (e.g., cancelled class, etc.); and Course Overload for individuals who take on an increased teaching load for any other reason. Again, individuals can have more than one category for course reductions, but each one must be listed on separate lines.

- In Column G, list the number of course additions for the academic year on the corresponding row.

- In Column I, list the rationale for the reductions and additions. It is helpful to both the department and the college to give a detailed rationale, as it helps to ensure that reduction and additions are being recorded and used correctly.

- Once reductions and additions are categorized and weighted in the appropriate sections, the totals at the top of the form will be automatically tabulated.

- Column H will automatically populate as you complete the form.

- **Academic Terms**

  - This section is used to track whether individual faculty members are completing their assigned number of courses and that the department has assigned the correct amount of courses.

  - For each faculty member, list the course number(s) they are scheduled to teach for each term, including those that are in other units. If you do not know the exact section, you can put a placeholder in this section (e.g. XXXX). In the Weight column, list a numeric value on the corresponding row for each course taught that term. Use decimals to represent partial credit (e.g., 0.5 for half a course).

  - The rest of the columns will automatically populate as you complete the form.

- **Tips for Utilizing the Course Assignment Inventory Worksheet**

  - Yield is derived from dividing the Adjusted Load for Yield by the Base Load.

  - Notice that Yield is derived based upon the reductions and additions listed to the left of the Yield configuration box. Reductions to the right (Course Buy Outs, FML, etc.) reduce the number of courses that your department needs to assign but do not affect your overall yield percentage.

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- This document should also be used by department chairs and school directors to determine how to allocate Special Assignments and recommendations for Faculty Professional Leave.
    - To do so, record all other course reductions and additions first. The numbers at the top of the section, including the yield percentage, will adjust as the information is added.
    - From there, you can experiment with increasing the number of reductions and see how it affects the yield. The table below is an illustration of how you can utilize the information to make decisions:

	No Add'l Reductions	Option 1	Option 2	Option 3
Base Load	120	120	**120**	120
Current Reductions Counted in Yield	-15	-15	**-15**	-15
Current Additions Counted in Yield	2	2	**2**	2
Proposed Add'l Reductions to Yield	0	-2	**-5**	-7
Adjusted Load for Yield	107	105	**102**	100
Yield	**89.20%**	**87.50%**	**85%**	**83.30%**

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