



Make Data-Informed Faculty Line Requests Using APS

APS Faculty Line Request Toolkit

Academic Performance Solutions

Academic Performance Solutions

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Introduction

Introduction

Significance of Embedding Data in Faculty Line Requests

The process to allocate new faculty lines varies widely both within and across institutions. Although most faculty lines are allocated during the Spring term to align with budgeting, openings may arise throughout the year due to various reasons. Faculty lines have a large impact on departments and the institution as a whole, so it is critical for institutions to establish a standardized and data-informed process for leaders to follow.

Why Data Should Be Used in Requests

Instructional staff are an institution's most valuable resource, but also one of its largest investments. As such, leaders need to have a better understanding of how faculty lines impact budgeting and resource use across departments – areas that data can help illuminate.

Impact of Including Data in Requests

- **Improves Transparency:** Leaders gain insight into resource use and needs beyond their own department, allowing instructional staff to understand why a request was or was not approved
- **Aligns Institutional and Departmental Priorities:** Institutions can assess departmental health and make efforts to bring it in line with institutional goals
- **Enfranchises Instructional Staff in Budgeting:** Improved visibility into budget process via resource allocation decisions puts greater onus on instructional staff to share responsibility in managing the budget

How Metrics Help Tell a Story

Including the right data in faculty line requests tells a more comprehensive and compelling story about why a new faculty line is needed and complements qualitative observations.

1 Establish Need



Demonstrate how demand for student credit hours (SCH) is changing and why an additional faculty line will better support student progress.

- ▶ *Sample metrics: 3-year trend of attempted SCH, percent of attempted SCH taught to own majors*

2 Showcase Current Efficiencies



Show that there are few opportunities to reallocate current resources though collapsing sections or increasing class sizes by including information on current fill rates and class sizes.

- ▶ *Sample metrics: Class fill rate benchmark, percentage of classes with less than 10 students, number of collapsible sections*

3 Highlight Impact



Illustrate the impact of a new faculty line on department productivity and student progress by showing a reduction in faculty overload and more opportunities for students to enroll in bottleneck courses.

- ▶ *Sample metrics: Projected SCH per full time faculty member, number of courses that the new faculty member will teach that are bottlenecks*

Throughout this toolkit, you'll find seven tools to support your institution's faculty line request initiative.

✔ **Tool 1:** Milestones

✔ **Tool 2:** Talking Points Worksheet

✔ **Tool 3:** E-mail Template to Introduce New Initiative

✔ **Tool 4:** How-to Guide for Supporting Faculty Line Requests with APS Data

✔ **Tool 5:** Faculty Line Request Worksheet

✔ **Tool 6:** Results Worksheet

✔ **Tool 7:** Reflection Guide



Milestones

TOOL

Use this timeline to guide and track your progress as you design and implement a new faculty line request initiative.

1

Milestones

The high-level set of milestones provides guidance for key steps to create and implement a new faculty line request initiative. Please reach out to your Strategic Leader to create a more detailed and customized plan for your institution.

To efficiently accomplish the last phases of the process, measuring results and reflecting on the process, ensure your institution is keeping track of the time it takes to complete each step of the initiative and any observations you would like to consider upon completion of the initiative.

Phase	Milestone	Who	Target Date	Actual Date
Planning (1 month)	Determine goals and ownership	Provost's office and deans		
Template Creation (1 month)	Create a templated faculty line request worksheet by selecting APS metrics <ul style="list-style-type: none"> ▶ <i>Tool 4: How-to Guide for Supporting Faculty Line Requests with APS Data</i> 	Provost's office, deans, and APS Strategic Leader		
Launching Initiative (1 month)	Introduce objectives of the new initiative and worksheet with department leaders <ul style="list-style-type: none"> ▶ <i>Tool 2: Talking Points Worksheet</i> ▶ <i>Tool 3: E-mail Templates to Introduce Initiative</i> 	Provost's office and deans		
APS Platform Training (1 month)	Collaborate with your APS Strategic Leader to organize and hold platform trainings with department leaders	Provost's office, deans, department leaders, APS Strategic Leader		
Execution (1-2 months)	Complete faculty line request worksheet using APS data <ul style="list-style-type: none"> ▶ <i>Tool 5: Faculty Line Request Worksheet</i> 	Department leaders		
	Meet and discuss faculty line decisions	Provost's office and deans		
	Measure results, such as dollars reallocated, and communicate them to appropriate leaders <ul style="list-style-type: none"> ▶ <i>Tool 6: Results Worksheet</i> 	Provost's office, deans, and APS Strategic Leader		
Reflection (1 month)	Reflect on the initiative's process and results <ul style="list-style-type: none"> ▶ <i>Tool 7: Reflection Guide</i> 	Provost's office, deans, and APS Strategic Leader		



Talking Points Worksheet

TOOL

Once your institution has established goals and ownership for the new initiative, fill out the worksheet to prepare for questions you may receive from department leaders.

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Talking Points Worksheet

When launching a new initiative, it is critical to gain buy-in and understanding among involved leaders from the start. Complete this worksheet as a starting point for crafting your talking points addressing anticipated questions about the new initiative.

“Why are we using APS data?”

Consider: The APS platform includes various metrics aggregated across our student, HR, and finance data. Although we may use additional sources of data to complement requests, use of the APS platform to provide specific metrics ensures that everyone is looking at the same information.

“Which types of metrics will be included in the requests?”

Consider: We will use metrics that support faculty line requests by establishing need, showcasing current inefficiencies, and highlighting impact. There are four specific types of metrics:

- 1 Department** Establishes the state of the department and broader context for the request
- 2 Instructional Staff** Assesses instructional headcount and workload, as well as how staff impact student progress
- 3 Course** Provides insight into use of instructional resources and demand for courses
- 4 Student Progress** Demonstrates how productive instructional staff are in terms of generating earned credits

“Are factors, such as service and publications, accounted for in APS data?”

Consider: These factors are not included in APS data, but the APS platform serves as one data source to inform faculty line requests and tells one part of the story. We will also use other data sources available to us.

“How will these requests be used or evaluated?”

Consider: Requests will be evaluated by deans and the Provost’s office to assess the department’s resource use and need for additional faculty line(s), ultimately informing resource allocation and budgeting decisions.

“How will departments be evaluated against peer benchmarks?”

Consider: Peer benchmarks are used as a point of comparison, but our departments are not expected to exactly match. Departments below benchmarks will not be penalized. We will consider other data and qualitative info.

“When are we expected to submit a data-informed request using the template?”

Consider: This process will apply to all faculty line requests, even ad hoc requests.



E-mail Template to Introduce New Initiative

TOOL

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To ensure a new initiative is positively received across campus, it is important to first introduce the topic and use of data in person. This allows for discussion and clarification, which can be difficult to achieve over e-mail. After the verbal introduction, we recommend sending an e-mail in follow up.

E-mail Template: Follow-up Introduction

From: Provost or Dean (suggested)

To: Department leaders (suggested)

Subject line: New initiative to support faculty line requests

Dear [Names],

I am excited to share more details about a new initiative to streamline and support the faculty line request process. As we discussed, our current faculty line request process is not transparent and has resulted in a need for greater understanding into why faculty lines are or are not granted.

This new process will begin on [date] to align with our budgeting cycle and will continue throughout the year whenever a faculty line is left empty, or a need arises. To support you in completing the templated faculty line request worksheet, I have **attached** a guide to help you locate critical metrics in the Academic Performance Solutions (APS) platform. Once faculty line requests are submitted and reviewed, [Names] will coordinate a time to discuss outcomes with you.

I look forward to kicking off this new initiative and am excited to see how it strengthens our institution. If you have any questions, please let me or [Name of designated project owner] know.

All the best,

[Name]



How-to Guide for Supporting Faculty Line Requests with APS Data

TOOL

4

Use this guide to locate metrics in the Instructional Staff Capacity Planning dashboard to include in your faculty line request template. If your institution selects metrics different from the ones included in this guide, work with your Strategic Leader to determine the best ways to use APS metrics.

Guided Analyses to Support Your Decision-Making

Throughout the Instructional Staff Capacity Planning dashboard, the data builds upon itself to arm users with context on course demand, efficiency of course offerings, and instructional capacity before considering adding or removing a faculty line. Start your analysis by selecting the appropriate filters, then move down the page.

Summary Trends

The dashboard starts with Summary Trends, which consists of metrics found later in the dashboard. Use this section to achieve a high-level look into the state of the department.

Attempted Credit Hours (SCH)		Seat Utilization and Class Size		Median SCH Taught	
Total	3-Year Trend	Median Section Fill Rate	3-Year Trend	Full Time Instructors*	3-Year Trend
12,641	+21.9%	70.0%	-6.9%	212	+2.6%
		Median Section Size	3-Year Trend	Other Instructors	3-Year Trend
		22	-7.1%	186	+4.3%

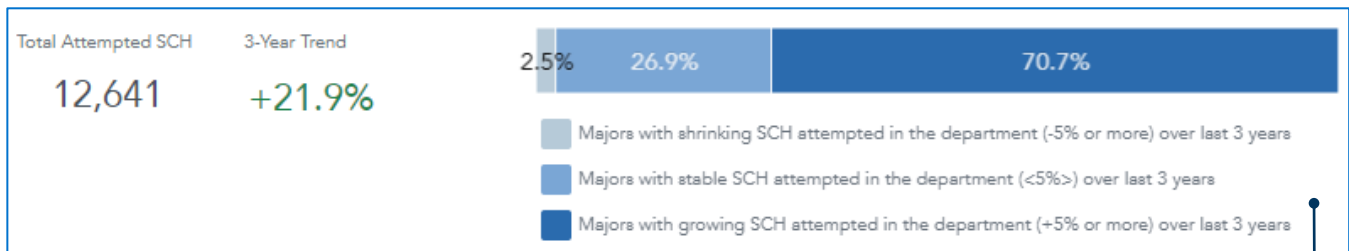
In this example, Attempted SCH is growing positively which indicates a potential need for additional resources to support demand.

The department is experiencing negative trends in median section fill rate and section size, but positive trends in median SCH taught. These trends indicate potential opportunities to consolidate sections and reallocate instructional time from low-fill sections in order to accommodate growing demand and workload in the department.

[I] Attempted Student Credit Hours (SCH): How is Course Demand Changing?

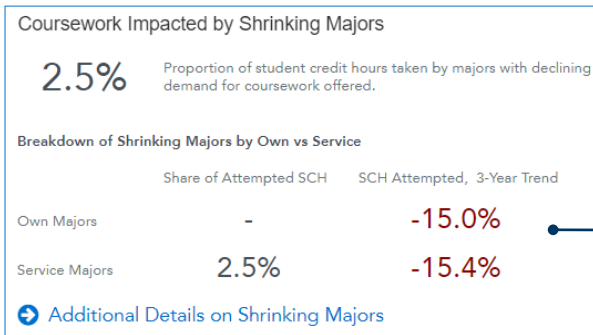
View enrollment demand by shrinking and growing majors for the department's courses.

- 1 Use the *SCH Taken by Student from Growing or Shrinking Majors* report to view the projection for demand in the department.

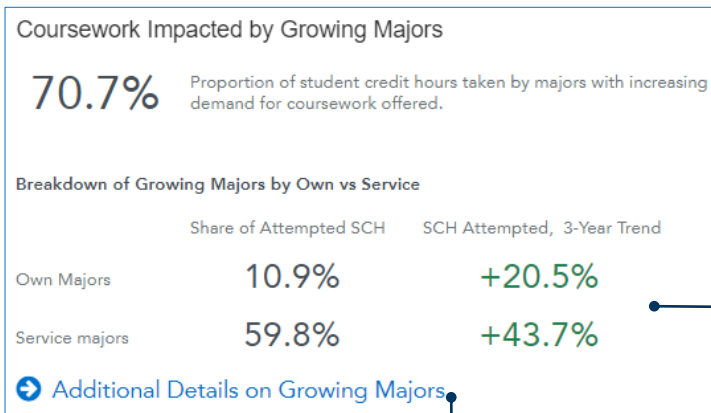


An outsized percentage of growing majors indicates increased demand for coursework and potential need for additional resources.

- 2 Use the *Coursework Impacted by Shrinking Majors* and *Coursework Impacted by Growing Majors* reports to assess how much coursework is being contributed by growing and shrinking majors.



Shrinking majors contribute a relatively small proportion of SCH in the selected department and the amount of coursework attempted by shrinking majors has decreased, but not substantially.



Most SCH (70.7%) in the department are being contributed by growing majors, and within that group, by service majors. This indicates the need to monitor enrollment in these other departments and identify opportunities for curricular innovation.

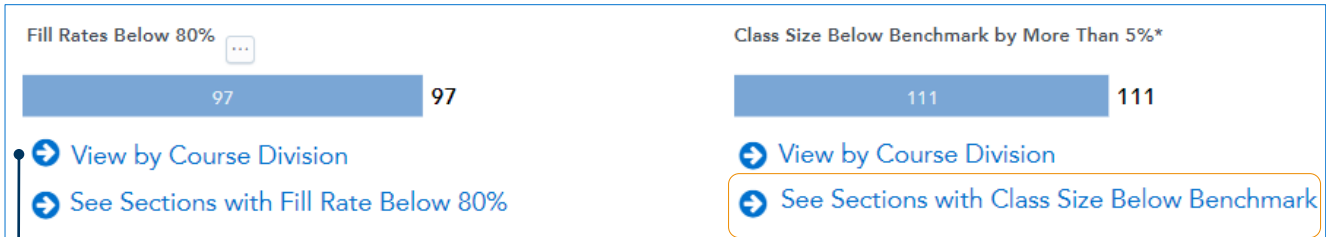
The SCH Attempted, 3-Year Trends, are higher than those of the shrinking majors which contextualizes the overall +21.9% Attempted SCH, 3-Year Trend in the selected department.

Click on the *Additional Details on Growing Majors* drilldown report to view which majors are growing and gain more context into shifts in demand based on student major.

[II] Seat Utilization and Class Size: How Efficient Are Current Course Offerings?

With an understanding of demand for the department’s courses, now assess efficiency of course offerings and determine if there are opportunities to offset the need for new instructional staff by consolidating sections. This part of the dashboard includes prescriptive guidance on where to prioritize attention based on whether enrollment in a section is the result of growing or shrinking majors, or neither.

- 3 Use the *Consolidation Opportunities: Sections Below Recommended Range* reports to pinpoint consolidation opportunities by comparing fill rates and class sizes to benchmarks.



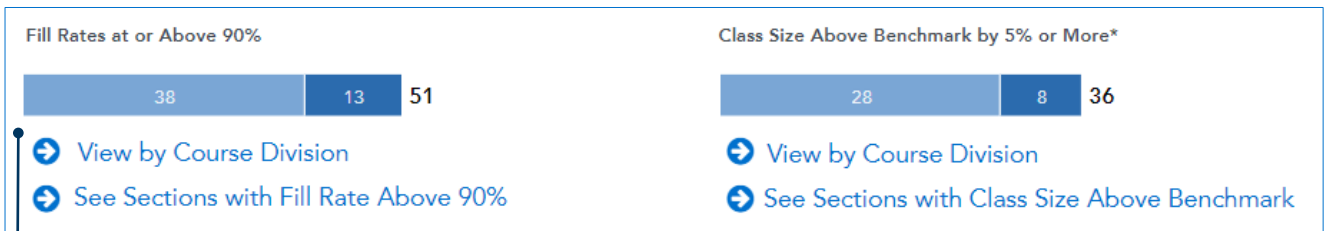
As shown in the key, the light blue color represents Lower Priority Review. The department’s enrolment in sections with fill rates below 80% and class sizes below benchmark by 5% or more, is made up of less than 20% of majors with changing demand.

See Sections with Class Size ... » Drill ...

Course Code	Course Ref N	Course Name	Course Type	Course Division	Course Level	Size	% Delta from Cohort	Class Capacity	Fill Rate	# of
GEOG300	12/05	Masked GEOG300	Lecture/Lab	Upper Division	300-Level	5	-16.0%	25	100.0%	
GEOG321	30347	Masked GEOG321	Lecture	Upper Division	300-Level	5	-16.0%	30	83.3%	
POLS331	13036	Masked POLS331	Lecture	Upper Division	300-Level	5	-16.0%	35	71.4%	
GEOG451	13130	Masked GEOG451	Lecture	Upper Division	400-Level	8	-12.5%	30	60.0%	
POLS421	24094	Masked POLS421	Lecture	Upper Division	400-Level	8	-12.5%	30	60.0%	
GEOG308	30344	Masked GEOG308	Lecture	Upper Division	300-Level	6	-11.5%	30	86.7%	
POLS326W	25980	Masked POLS326W	Lecture	Upper Division	300-Level	6	-11.5%	35	74.3%	
POLS331	28428	Masked POLS331	Lecture	Upper Division	300-Level	7	-7.4%	30	90.0%	
GEOG402	13652	Masked GEOG402	Lecture	Upper Division	400-Level	9	-6.6%	25	76.0%	
	23666	Masked GEOG402	Lecture	Upper Division	400-Level	9	-6.6%	20	95.0%	
GEOG408	30391	Masked GEOG408	Lecture	Upper Division	400-Level	9	-6.6%	25	76.0%	

The *See Sections with Class Size Below Benchmark* drilldown report can make the case for a new faculty line more compelling. The *% Delta from Cohort* metric in the report shows that, in the selected department, the largest differences in class size from the benchmark is present in Upper Division courses. This would support the case for a new faculty line for Lower Division courses.

- 4 Use the *Expansion Opportunities: Sections Above Recommended Range* reports to identify expansion opportunities by comparing fill rates and class sizes to benchmarks.



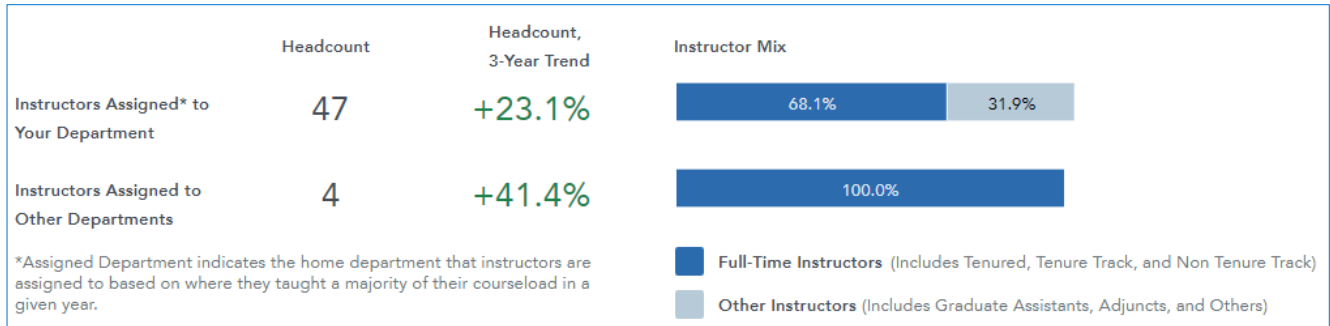
In this example, the distinction between Higher Priority Review (darker shade of blue) and Lower Priority Review is prominent. In these reports on the dashboard, Higher Priority shading represents sections above recommended range consisting of only growing majors. There are 13 potential opportunities to expand classes with fill rates at or above 90% and 8 opportunities to expand class sizes above benchmark by 5% or more – which represents need for instructional resources.

The *See Sections with Fill Rate Above 90%* and *See Sections with Class Size Above Benchmark* drilldown reports provide more context and illustrate that these courses may require additional instructional capacity to accommodate enrollment from growing majors.

[III] Median SCH Taught: Do You Have The Right Instructional Capacity to Meet Course Demand?

Now that you have context about the selected department’s enrollment trends and efficiency of its course offerings, use the last part of the dashboard to assess current instructional capacity and workload.

- 5 Use the *Headcount* metrics and *Instructor Mix* report to see how many instructors assigned to the selected department and other departments are teaching in the selected department.



- 6 Use the *Distribution of Instructor Teaching Load Within Your Department* reports to view how much the department’s instructors are teaching and how it has changed over three years.

	Headcount	Median SCH Workload Per Instructor	Median SCH Workload, 3-Year Trend
Tenured (FT)	15	159	-9.0%
Tenure Track (FT)	6	321	-14.4%
Non Tenure Track (FT)	11	243	+21.9%
Other	15	186	+4.3%

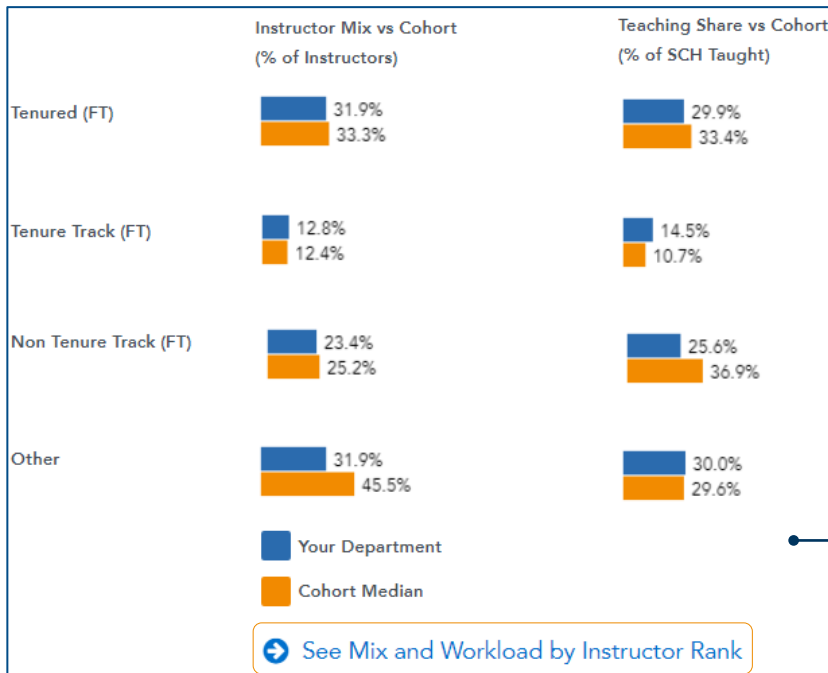
Using the benchmarks, the median SCH workload of Tenured and Tenure Track instructors has decreased over the last three years whereas Non-Tenure Track and Other has increased. This is inconsistent with the department’s expectations, which indicates an opportunity to better balance workload across instructor types.

[See Load Distribution by Term](#)

The *See Load Distribution by Term* drilldown report shows the percentage of instructors teaching within specific credit hour groupings. Knowing your own institution’s standard load, identify what percentage is teaching below it.

Standard Term Name	Standard Instructor Type	Non Tenure Trac	Not Benchmark	Tenured	Tenure Trac
Fall	% of Instructors Teaching 0 - 5.9 Credit Hour Lo	10.3%	12.8%	7.7%	2.6%
	% of Instructors Teaching 6 - 8.9 Credit Hour Lo	5.1%	17.9%	12.8%	5.1%
	% of Instructors Teaching 9 - 11.9 Credit Hour L	2.6%	2.6%	2.6%	2.6%
	% of Instructors Teaching 12+ Credit Hour Load	5.1%	2.6%	5.1%	2.6%
Spring	% of Instructors Teaching 0 - 5.9 Credit Hour Lo	5.6%	16.7%	5.6%	-
	% of Instructors Teaching 6 - 8.9 Credit Hour Lo	5.6%	11.1%	5.6%	2.8%
	% of Instructors Teaching 9 - 11.9 Credit Hour L	8.3%	5.6%	2.8%	5.6%
	% of Instructors Teaching 12+ Credit Hour Load	5.6%	-	13.9%	5.6%

7 Use the *Comparison of Instructor Mix to Benchmark* report to compare the department's instructor mix and teaching share to the cohort.



Taking findings from step 6, the *Comparison of Instructor Mix to Benchmark* report shows that although the median SCH workload of Tenured and Tenure Track instructors has decreased, their teaching shares are now close to those of the cohort.

Applying your findings from this and earlier parts of the dashboard, identify what type of instructor a new faculty member would be.

Standard Instructor Type	Instructor Rank	Headcount	% of Instructors Ass	Total SCH Tauç	% of Total SCH Taught†	Median SCH Tau‡	3-Yr Trend, Median S
Non Tenure Track	Other	11	23.4%	3,156	25.6%	201.0	+31.1%
	Rollup	11	23.4%	3,156	25.6%	201.0	+31.1%
Not Benchmarked	Instructor	14	29.8%	3,372	27.4%	172.5	+0.4%
	Other	1	2.1%	324	2.6%	324.0	-
	Rollup	15	31.9%	3,696	30.0%	186.0	+4.3%
Tenured	Other	15	31.9%	3,678	29.9%	105.0	-16.3%
	Rollup	15	31.9%	3,678	29.9%	105.0	-16.3%
Tenure Track	Other	6	12.8%	1,791	14.5%	321.0	-14.4%
	Rollup	6	12.8%	1,791	14.5%	321.0	-14.4%
Rollup		47	100.0%	12,321	100.0%	183.0	+3.4%



Faculty Line Request Worksheet


TOOL

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Once your institution has selected metrics for leaders to include in faculty line requests, create a templated worksheet for them to easily provide metrics. Using the Instructional Staff Capacity Planning dashboard, EAB has created a templated worksheet that you can customize.

Faculty Line Request Worksheet

Using the Instructional Staff Capacity Planning dashboard, EAB has created a templated worksheet that you can customize for your institution, Create a worksheet, like this one, for leaders to easily provide the required metrics for faculty line requests. Ensure leaders apply the appropriate filters before answering questions.


Academic Performance Solutions

Faculty Line Request Worksheet

Name: [Click or tap here to enter text.](#)
College Name: [Click or tap here to enter text.](#)
Department Name: [Click or tap here to enter text.](#)

Summary Trends
 Under the *Summary Trends* header in the Instructional Staff Capacity Planning dashboard, input the values shown in your institution's APS site.

Course Demand		Section Capacity Utilization		Instructional Staff Utilization	
Attempted Credit Hours		Seat Utilization and Class Size		Median SCH Taught	
Total	3-Year Trend	Median Section Fill Rate	3-Year Trend	Full-Time Instructors	3-Year Trend
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
		Median Class Size	3-Year Trend	Other Instructors	3-Year Trend
		Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

The following questions will allow you to provide additional data points to add nuance to your evaluation. If you choose not to complete questions 1-4, please skip to the Reflection and Action Planning section (questions 5-6) to document your finding and recommendations.

[I] Attempted Student Credit Hours (SCH): How is Course Demand Changing?

Use the first part of the workflow to answer the following questions.

1. Use the **SCH Taken by Student from Growing or Shrinking Majors** report to view demand for the department.
 - a. What percentage of coursework comes from shrinking vs. growing majors?
 - i. % Coursework from Shrinking majors: [Click or tap here to enter text.](#)
 - ii. % Coursework from Growing majors: [Click or tap here to enter text.](#)

If more SCH are coming from shrinking majors, then your rate of SCH growth may taper in future years, limiting your need for additional faculty. However, if more SCH are coming from growing majors, your SCH growth may accelerate, enhancing your need for additional instructional resources.

Download the Worksheet in Two Ways

- 1. Instructional Staff Capacity Planning dashboard:** Click the "Download a templated worksheet to input your observations and determine next steps." link at the top of the page
- 2. How-to Guides tab on the Resource Center: Help & Training dashboard:** Click on the "Example Faculty Line Request Worksheet"



Results Worksheet

TOOL

6

After completing the process, measure results of your faculty line request process. Ensure your institution is measuring and keeping track of the information asked in the following questions throughout the process.

Results Worksheet

Measure results of your institution's initiative using this worksheet. Before implementing your new initiative, ensure your institution is measuring and keeping track of the information asked in the following questions.

1 How many faculty lines were and were not approved? How does this compare to the process before the standardized APS template was used?

2 What is the cost savings associated with the faculty lines that were not approved?

3 What is the cost savings associated with faculty lines that were reallocated to departments with demonstrated need?

4 How many additional sections were you able to add to high-fill or bottleneck courses? Did the new sections accommodate all student demand?

5 How much time did it take for department leaders to complete the request template? How does this compare to the process before the standardized APS template?

6 How much time did it take for leaders to review the requests? How does this compare to the process before the standardized APS template?

7 How has the new faculty line(s) impacted instructional workload in your department?

8 Has your new faculty line(s) brought instructor workload in line with peers?

Cases in Brief: Impactful Results from New Initiative

Using APS Data to Inform Faculty Line Requests and Decisions



St. Ambrose University (SAU) is a private master’s university in Davenport, IA. In the past, SAU’s Faculty Finance Committee (FFC) could only review a handful of departments each year because the process was very time-intensive. To accomplish better insight into departmental health, including the need for faculty lines, SAU implemented a new annual departmental review process supported by metrics in the APS platform.

Accomplishing Administrative and Financial Results

Rather than manually collecting and analyzing data for a few departments under review, SAU’s finance team used APS metrics to create comprehensive reports for every department. By including operational and financial metrics, department chairs could understand how their operational decisions impacted their financial results.

Department-Level Reports Created with APS Data

FFC created reports for all 40 departments at SAU using 18 APS metrics

- Gained insight into enrollment trends, instructional staff mix and workload, section size and utilization, and costs
- Engaged department leaders in data-informed conversations to discuss reports, which illuminated existing efficiencies and potential opportunities
- Department leaders used the reports as a common supporting resource, allowing them to understand needs across departments – not just their own



700 Hours

saved in manual data collection and analysis, as well as creating reports



\$446,000

reallocated faculty lines to two growing and new programs instead of filling five retired faculty lines



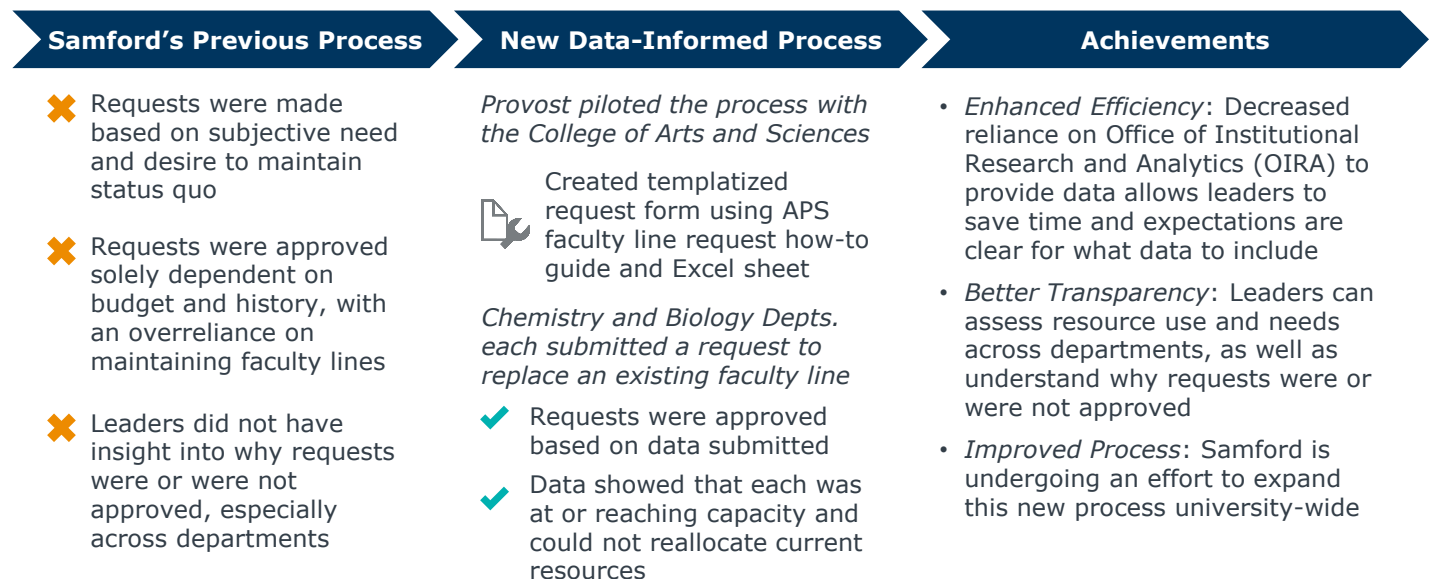
100%

departments reviewed, instead of a few



Samford University is a private master’s university in Birmingham, AL. Historically, there was not a formal faculty line request process in place. Department leaders and deans took a haphazard approach to filling faculty lines and submitted different types of data, if any, to support requests. Samford transformed their process by requiring all leaders in the College of Arts and Sciences to complete a templated faculty line request document using APS metrics.

Implementing a Standardized Faculty Line Request Process





Reflection Guide

TOOL

7

Once your institution has completed the new faculty line request process and filled out the Results Worksheet, use this guide to reflect. This will help you proactively prepare for next year.

Reflection Guide

Use this guide to reflect on your institution's new faculty line request process. This will help you proactively prepare for next year.

Ask the following questions to gather feedback from academic stakeholders who were involved in the process. To promote honest candor, we suggest you request anonymous responses.

- 1 How effective do you think communication about and throughout the process was to academic leaders, such as yourself?
- 2 Did you understand why you were asked to provide specific data points, and could you interpret the data given the resources you were provided?
- 3 Would you have found any additional resources to help clarify our institution's new process, the data points involved, and expectations? If so, what resources?
- 4 Did you understand the goals of this new process and why our institution did it? Do you think we accomplished our goals?
- 5 Which parts of the process do you think went well? Not so well?
- 6 How would you grade the entire process? In what ways could that grade be improved for next year?

To inform your strategy moving forward, answer the questions above and use the collected feedback. Additional questions for initiative leaders are below.

- 1 How did the proposed and actual timelines compare?
- 2 In what ways would you change your strategy, regarding communication, training, and resources provided to users?
- 3 What would you like to share internally with your institution's senior leadership about this initiative?



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