

Allocation: A Collective Responsibility and a Pedagogical Tool

A haze of misunderstanding seems to shroud the concept of allocation. To many, it may seem like a nugget of gold traded in exchange for the services of a master teacher leading a discipline course taught in a program... but is this truly the case? This article aims to answer some of the most frequently-asked questions about allocation to ultimately reveal its uses as a powerful pedagogical tool.

What is allocation?

A college's allocation is determined by financial procedures established by the *Ministère de l'Éducation et de l'Enseignement Supérieur*. The detailed procedure, known as Annexe E002, is used to determine the total number of full-time professors (full-time equivalent or FTE¹) that a college is entitled to engage for a given academic year. It includes rules for the allocation of three types of teaching duties: Type 1 (in-class and department responsibilities **for all**), Type 2 (department responsibilities for some, **in each department**), and Type 3 (institutional responsibilities for some faculty **in the College**). The three types of workloads are outlined in Article 8-4.01 of the FNEEQ Collective Agreement. For the purpose of implementing the College's Strategic Plan and the Student Success Plan, guidelines for allocation are stipulated in a part of the collective agreement called Column D². These additional teaching resources are allocated specifically for the purposes of program activities, professional development for the development of teaching methods and for given subjects, the organization of fieldwork and workshops, improvement of student success rates, technology transfer, research, and professional integration. These varied categories of allocation lead to activities and involvement that reach far beyond the classroom!

Other ministerial envelopes (such as S051) bring resources to the College, providing further opportunities for teachers.

What is the staffing project?

The staffing project is a tool that details the use of the allocation received by a college. It includes:

- an estimate of full-time professors (FTE) generated by the PES formula³, details about release for department and program coordination, special support and program activities, as well as program development, implementation, and evaluation (all Type 2 workload teaching duties);

- details about release for professional development activities, pedagogical research and innovation, and subject-related fieldwork or activities in the workplace (all Type 3 workload teaching duties);
- details about release for student success initiatives and activities (Column D or Volet D);
- details about other kinds of release.

What is the difference between a *poste* and a *charge*?

Actually, both are annual contracts. A *poste* is most often comprised of a combination of Type 1 and Type 2 allocation. In essence, the workload belongs to the teacher to which it is assigned. A *charge*, on the other hand, is usually comprised of workload that has been "released" by a more senior teacher and is offered to the next most senior teacher who does not have an annual workload.

Is there a limit to the number of teachers the College can hire?

Yes. The allocation generated through the provisions of Annexe E002 along with the different types of release provides the resources for teacher workloads, but it is a college's responsibility to manage these resources in such a way as to ensure continuity and sustainability while maintaining quality program offerings. The teaching allocation budget given to a college is a closed envelope. This means that resources cannot be used for anything other than teaching activities, and that the annual balance (whether surplus or deficit) is transferred to the next year. A college must use the different funding envelopes wisely in order to avoid using too much allocation and creating a deficit. It is imperative to avoid creating or when necessary, reabsorbing layoffs of tenured faculty, otherwise known as *mises en disponibilité* (MEDs). Hence, Vanier College is constantly considering how best to manage its resources in order to provide stability for all of our teachers. To date, we have been very successful in avoiding MEDs,

¹ One FTE is 80 CI over the year

² See Article 8-5.06 of the FNEEQ Collective Agreement for more details.

³ PES is the acronym for Period – Élève – Semaine; it represents the number of student periods per week. This figure is calculated by multiplying the number of students enrolled in all sections of the course by the sum of the theory and laboratory components of that course in the given semester

but we have had to start making difficult choices with regards to the distribution of the allocation as we have been moving closer and closer to an overall annual deficit situation.

What types of measures can we take to ensure the best use and long-term stability of our teaching resources?

The distribution of allocation is a collective responsibility and should be done in a department setting⁴. All teachers make up the department and together, they should define its internal rules of operation, including how allocation will be distributed. This is not a responsibility that is limited to the coordinator, and seniority is not listed in the collective agreement as a criteria granting priority of choice for a specific workload distribution. A department must be wise in using allocation resources, as it is easy to artificially boost a teacher's CI⁵ by adding a third preparation or by splitting sections between multiple teachers. This will increase CI, but not FTE; in some cases, it will add to the amount of preparations on a given teacher's plate.

Workloads should be equitably distributed across all the teachers within a discipline. Normally – there are some exceptions to this rule – all full-time annual workloads should have an allocation value of between 80 and 85 CI, split over two semesters. Lowering the CI of permanent teachers in order to artificially inflate the value of contracts for non-permanent faculty should always be avoided.

Beyond this, there are a number of ways to protect teaching resources. For example, Annexe S051 indicates that funds are to be used to release teachers from their workloads so that they can dedicate their time to developing student success activities that improve accessibility for students with different needs. For the duration of the Fall 2018 semester, the granted releases were for the equivalent of one day a week or more (22 weeks/semester or 44 weeks/year) – this representing 20% or more of the workload for the semester or 10% or more of the annual workload (≥ 0.1 FTE). Instead of being determined based on a teacher's course load, project-related release should be based on the number of hours the project requires. The table below outlines the number of hours represented by different possible amounts of release time in a given semester:

Amount in FTE (full-time equivalent)	Number of hours per week	Total number of hours
0.1	6.5	143
0.125	8	179
0.150	9.75	215
0.167	10.85	239
0.2	13	286
0.250	16.25	357.5

If the release does not correspond to a typical release time for a given department, arrangements can be made with the Faculty Dean to balance a teacher's workload in order to better reflect the typical release time usually granted for the department.

According to the collective agreement (8-4.03), all teachers are expected to participate in 173 hours of collaborative school life activities each year. This time allows teachers to engage in pedagogical activities to enrich the learning experience of students and contribute to student success without requesting release.

It is also the case that any given department can propose to offer a new course with an expected initial lower enrollment, while at the same time providing allocation neutrality. By not offering one course of the same category (whether option or complementary) and by asking colleagues to accommodate one or two extra students in their section while maintaining a yearly CI below 85 (the maximum) and a PES below 415, the department can provide proper support and respect the initial allocated FTEs. As you may be aware, only eight months ago, I was a teacher and acting coordinator for the chemistry department. I remember working with my colleagues a few years ago to support a certain Physical Chemistry option course in these ways. I recall that none of us noticed a significant increase of daily workload as a result. The solution that our department came to collectively has worked. For the past 4 years, the course Physical Chemistry (202-HTQ-VA), has consistently been recording 39-41 enrolled students after validation in Clara.

How is the allocation value of an individual teacher's workload determined?

If you are a new teacher or you simply need a refresher on the tools of CI and PES, the following is a simple CI calculation scenario to consider. Sylvie is teaching the following two Chemistry courses in the fall 2018 semester:

- 202-NYA-05, General Chemistry
 - o The course has a ponderation of 3-2, meaning 3 hours of theory in class and 2 hours of laboratory, for a total of 5 hours of preparation.
 - o The course has 40 students.
- 202-HTJ-05, Organic Chemistry I
 - o The course has a ponderation of 3-2, meaning 3 hours of theory in class and 2 hours of laboratory, for a total of 5 hours of preparation.
 - o The course has 36 students.

⁴ See article 4-1.05 of the FNEEQ Collective Agreement for more details.

⁵ CI (*charge individuelle*) is a figure that represents an individual teacher's workload.

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Her individual teaching load for the fall is calculated using the formula

$$CI = HP \text{ (Preparation Hours)} + HC \text{ (Contact Hours)} + \{[NES^6 \text{ (Nombre-Étudiant-Semaine)}] + [NES \text{ factor}]\}^7.$$

The CI for Sylvie's courses is calculated as follows:

202-NYA-05, where 40 students are split into two lab sections of 20 students each:

$$CI = [theory (3 \text{ hrs } HP \times 0.9) + theory (3 \text{ hrs } HC \times 1.2)] + [first \text{ lab } (2 \text{ hrs } HP \times 0.9) + first \text{ lab } (2 \text{ hrs } HC \times 1.2) + 2nd \text{ lab } (2 \text{ hrs } HC \times 1.2)] + \{[120 \text{ PES theory} + 40 \text{ PES lab} + 40 \text{ PES lab}] \times 0.04\} = [2.70 \text{ CI} + 3.60 \text{ CI}] + [1.80 \text{ CI} + 2.40 \text{ CI} + 2.40 \text{ CI}] + \{8.00 \text{ CI}\} = \mathbf{20.90 \text{ CI}}$$

202-HTJ-05, where 36 students are split into two lab sections of 18 students each:

$$CI = [theory (3 \text{ hrs } HP \times 0.9) + theory (3 \text{ hrs } HC \times 1.2)] + [first \text{ lab } (2 \text{ hrs } HP \times 0.9) + first \text{ lab } (2 \text{ hrs } HC \times 1.2) + 2nd \text{ lab } (2 \text{ hrs } HC \times 1.2)] + \{[108 \text{ PES theory} + 36 \text{ PES lab} + 36 \text{ PES lab}] \times 0.04\} = [2.70 \text{ CI} + 3.60 \text{ CI}] + [1.80 \text{ CI} + 2.40 \text{ CI} + 2.40 \text{ CI}] + \{7.20 \text{ CI}\} = \mathbf{20.10 \text{ CI}}$$

The total number of students is $76 \geq 75$ students, therefore $76 \times 0.01 = 0.76$ CI is added for the NES factor.

Sylvie thus has a **total CI of 41.80** in the fall semester.

Hopefully, this article helps to clarify the concept of allocation, its uses, and how precious it can be considering that a deficit is anticipated for the 2017-2018 academic year. Allocation is a collective responsibility; we must all be diligent regarding its distribution so that we are sure to be living within our means!



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