

# **Ohio University Task Force on the National Study of Instructional Costs and Productivity (Delaware Study)**

## **Report to the Provost**

The provost requested that Ohio University (Athens Campus) participate in the National Study of Instructional Costs and Productivity (i.e., The Delaware Study) in 2003-04. The Delaware Study allows universities to analyze teaching loads and academic costs at the academic discipline level compared to peer disciplines. A university-wide task force was appointed to examine the appropriateness and applicability of the Delaware Study as a tool for understanding teaching loads and costs at Ohio University, to explore possible uses of the data, and to identify data issues unique to Ohio University. Representatives from each academic college with faculty, the Office of Institutional Research, the Office of the Provost, and Faculty Senate participated in a year-long discussion about issues that will guide uses and interpretation of the results of the study. Following is a summary of that discussion and recommendations on appropriate uses of the Delaware Study data.

### **Appropriateness, Applicability and Recommended Uses**

The Task Force read background materials, including Michael Middaugh's Understanding Faculty Productivity, they had an opportunity to meet with Middaugh personally, and they discussed the appropriateness of the Delaware Study for Ohio University. There was general agreement that the study would be useful for department-self-examination and study and for long-range planning. Echoing Middaugh's advice, the Task Force agreed that the first round of data submitted should be examined for unknown data issues that would affect the results so that improvements could be made in subsequent years. The Task Force also agreed that the Delaware Study should not be used for ad hoc budget allocations or reductions. Rather, it should be used to inform long-range planning decisions.

The most positive feature of the Delaware Study is that it enables discipline-based peer comparisons. The Task Force discussed selection of peers at length. There are two variables in selecting peers—institution and discipline. The Task Force recommended flexibility in peer selection. Academic units need the ability to select their own peers, and they should be able to change the peer set over time. In reporting the Delaware Study data, the Task Force recommended that for each measure, three points be compared: Ohio University's academic unit; the department/school-chosen peer set; and a university-wide common peer set (e.g., all Carnegie research universities). Guidelines were offered to the academic units in selecting their peers:

- Peer universities could be peers or competitors or aspirants
- Peers should be publicly-controlled
- Peer selection should consider geographic region, where possible
- Peer selection should include universities with comparable academic programs in terms of highest degree, size, scope, and mix of undergraduates/graduate students
- Some peers should be selected in which a relationship exists between Ohio University's academic unit and the peer university's academic unit to facilitate queries, explanations of procedures, etc.
- The peers previously selected by graduate programs could be used as a starting point

Peer selection also needs to consider the variability of disciplines for comparison. The Delaware Study uses federal Classification of Instructional Program (CIP) codes to define disciplines, which can be ambiguous in how they are used at different universities.

The Task Force recommended that the following measures be used from the Delaware Study, mostly following Middaugh's examples:

- Undergraduate (total) credit hours taught per tenured/tenure-track faculty FTE
- Undergraduate (lower division) credit hours taught per tenured/tenure-track faculty FTE

- Graduate credit hours taught per tenured/tenure-track faculty FTE
- Total credit hours taught per tenured/tenure-track faculty FTE
- Total credit hours taught per total faculty FTE
- Direct instruction expenditures per total student credit hours
- Separately-Budgeted Research & Service Expenditures per tenured/tenure-track faculty FTE

### **Data Issues**

The Task Force studied the data submission requirements and guidelines and discussed the data to be submitted from Ohio University. Representatives from the colleges, departments, and schools had an opportunity to review the data. In fact, much of the data in Part A of the Delaware Study data collection form is included in the Compendium of Planning Information. Data were submitted in January 2004 based on academic and fiscal year 2002-03. Following are some idiosyncrasies of Ohio University's data that may affect how our departments/schools compare to peers:

- Quarter hours were reported; data will be converted by Delaware to semester hours.
- FTE for part-time faculty was calculated based on the Ohio University standard of 15 credit hours.
- The annual data (Part B) includes summer expenditures and credit hours.
- Credit hours and sections reported are based on the 15<sup>th</sup> day census date (consistent with Regents reporting and Ohio University Registration guidelines).
- Expenditures were allocated to departments; some centrally-budgeted activities were allocated to departments (e.g., Telecommunication Center, Student Teaching, Wellworks, Kennedy Museum, Child Development Center, and Education Abroad).
- At Ohio University the distinction between departmental research/service and separately-budgeted research/service is not uniformly understood and as a result may not be uniformly applied in the Oracle financial system.
- SIS does not track noncredit activity of graduate teaching assistants; a "test case" modification was made for Chemistry, Physics, and Biological Sciences.
- Dual-listed and arranged sections were reported as coded in SIS; submitted data were modified on request.
- "Individualized instruction" was identified using a variety of criteria in SIS.

### **Summary**

Results are expected from Delaware in July 2004. Once the results are received, the Office of Institutional Research will prepare tables and graphs of the results using the above measures. Ohio University's academic units are expected to review the results and provide interpretation that describes their productivity and costs, compared to their peers. They may want to incorporate the results and interpretations into their own planning processes. Once these results are reviewed, the Task Force's next step may be to make recommendations about how the Delaware Study data should be incorporated into Ohio University's comprehensive planning process. Another task is to decide how frequently Ohio University will participate. Middaugh suggested that analyzing trends over time is useful for informing planning decisions. Finally, it should be noted that the Task Force's deliberations were done prior to receiving final and comparative results back from Delaware. A review of the results may guide further deliberations and recommendations.