

SCOPE OF EFFORT WORKSHEET INSTRUCTIONS

The Scope of Effort Worksheet is a spreadsheet-based decision-making tool that enables institutions to compare the before activities (the traditional course) and the after activities (the redesigned course). Completing it allows you to consider changes in specific instructional tasks, make decisions about how to use technology (or not) for specific tasks, visualize duplicative or unnecessary effort and complete a cost/benefit analysis regarding the right type of personnel for each instructional task.

In planning for cost reduction as a part of redesign, there are two steps. The first is to complete the Scope of Effort Worksheet for the traditional and redesigned formats of the course. These let you demonstrate how the number of hours spent by each person involved in the course can change. The second step is to translate those “saved” hours to one of NCAT’s cost reduction strategies and capture your chosen strategy on NCAT’s Cost Planning Tool.

If you stop at the first step, you may create what NCAT calls *paper savings*. By *paper savings* we mean savings that represent a workload reduction for individual faculty members or others but do not produce cost savings for the department or institution.

Reducing time spent by individual faculty members and others as displayed on the Scope of Effort Worksheet is an *enabler* that allows you to choose a cost savings strategy, one of the choices listed in Chapter VI. For example, if a faculty member or TA spends half the time on the redesigned course that was spent on the traditional course, the faculty member or TA could increase section enrollment or carry two sections without an increase in workload. That then produces real savings to the institution.

The Scope of Effort Worksheet consists of two parts:

- Traditional Course – The left side of the worksheet is used to determine the activities involved in and the costs of preparing and delivering the course in its traditional format.
- Redesigned Course – The right side of the worksheet is used to determine the activities involved in preparing and delivering the course in its redesigned format *when it is fully operational*.

Here are the steps required to complete the Scope of Effort Worksheet and to calculate the savings that result from redesigning a course:

STEP 1 – Determine the average amount of time each type of instructor involved in preparing and offering one section of the course in its traditional format spends on each of the tasks by using the worksheet columns labeled “Traditional Course.”

STEP 2 – Determine the average amount of time each type of instructor involved in preparing and offering one section of the course in its redesigned format spends on each of the tasks by using the worksheet columns labeled “Redesigned Course.”

How to Complete the Traditional Course Worksheet Columns

Note: Data displayed for the course activities on the Traditional Course worksheet columns should reflect one section of the whole course for each type of instructional personnel.

General instructions

- Each column of calculations is labeled (e.g., tenure-track faculty, non-tenure track faculty, adjunct faculty, graduate teaching assistants) in the top row. Add other columns as needed.
- If a particular type of instructor is not utilized in your course, leave the columns blank or delete the columns.
- There are four major activities associated with preparing the course: curriculum design, materials acquisition, materials development, and preparation/training of instructional personnel.
- There are two major activities associated with delivering the course: instruction and evaluation.
- Column A lists the tasks associated with preparing and offering a course. Insert additional categories if needed. Do not delete tasks—just leave the hourly cells blank.
- The definitions of each activity are embedded in the worksheet. Click on the red triangle in the upper right corner of each cell.
- Some courses will involve only some tasks so do not necessarily expect to fill in every cell. If you need to add categories, insert them as needed after carefully considering the definitions embedded in the worksheet.

Entry instructions

- Enter the number of hours spent by each type of personnel on each task in one section of the course in columns C and D. Insert additional columns if needed.

Results

- The total number of hours spent by each type of personnel on preparing and delivering one section of the course will be calculated by the Scope of Effort Worksheet.

How to Complete the Redesigned Course Worksheet Columns

Note: Data displayed for the course activities on the Redesigned Course worksheet columns should reflect one section of the whole course.

General instructions

- Each column of calculations is labeled (e.g., tenure-track faculty, non-tenure track faculty, adjunct faculty, graduate teaching assistants) in the top row. Add other columns as needed.
- If a particular type of instructor will not be utilized in the redesigned course, leave the columns blank or delete the columns.
- Column F lists the tasks associated with preparing and offering a course. Insert additional categories if needed. Do not delete tasks—just leave the hourly cells blank.

Entry instructions

- Enter the number of hours planned to be spent by each type of personnel on each task in one section of the course in columns G and H. Insert additional columns if needed.

Results

- The total number of hours spent by each type of personnel on preparing and delivering one section of the course will be calculated by the Scope of Effort Worksheet.

Examples

- Three completed Scope of Effort worksheets that follow the blank form provide examples of how different institutions used the tool to document changes in workload, which supported their cost reduction strategies.