Quarter to Semester Conversion Workshop
Deans, Associate Deans, & Department Chairs

OFFICE OF FACULTY AFFAIRS
NOVEMBER 20 – 21, 2017 / FEBRUARY 15, 2018
Agenda

Sabbatical Leaves

Department Chair Appointments

FERP Faculty Options

2018-19 Academic Calendar Overview

Entitlements and Course Offerings

Lecturer Appointments
  ◦ Entitlements (12.3)
  ◦ Careful Consideration (12.7)
  ◦ Order of Assignment (12.29)

Entitlement Calculation Overview and Activity

Questions
Sabbatical Leave Options
Academic Year (AY)

**QUARTERS**
AY FACULTY OR COUNSELOR

- One (1) quarter at full salary;
- Two (2) quarters at three-fourths (3/4) of full salary;
- Three (3) quarters at one-half (1/2) of full salary

**SEMESTERS**
AY FACULTY OR COUNSELOR

- One (1) semester at full salary
- Two (2) semesters at one-half (1/2) of full salary
## Sabbatical Leave Options

### 12 Month

<table>
<thead>
<tr>
<th>QUARTERS</th>
<th>SEMESTERS</th>
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<tbody>
<tr>
<td>LIBRARIAN</td>
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<tr>
<td>• Three (3) months at full salary;</td>
<td>• Four (4) months at full salary</td>
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<td>• Six (6) months at three-fourths (3/4) of full salary;</td>
<td>• Eight (8) months at one-half (1/2) of full salary</td>
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<td>• Nine (9) months at one-half (1/2) of full salary.</td>
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Department Chair Appointments

• No Change in AY 2018-19

• Administrative Fraction Remains the Same After Conversion
FERP Faculty Options

The permissible "period of employment" shall refer to one (1) academic term not to exceed a total of ninety (90) workdays or fifty percent (50%) of the employee's regular time base in the year preceding retirement.

The examples below assume the employee worked full-time the year before retirement. If an employee worked less than full-time in the year preceding retirement then the examples below are prorated. FERP faculty may request a reduction in timebase which would then be permanent.

**QUARTER OPTIONS**

- One (1) quarter at full-time 15 WTUs
- Two (2) quarters with total 22.5 WTUs
- Half-time for the full AY total 22.5 WTUs

**SEMESTER OPTIONS**

- One (1) semester at full-time 15 WTUs
- Half-time for the full AY total 15 WTUs
# CONVERSION OF CURRENT FERP FACULTY

<table>
<thead>
<tr>
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<th>AY 2017-18</th>
<th>AY 2018-19</th>
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<tr>
<td></td>
<td>One (1) quarter at full-time 15 WTUs</td>
<td>One (1) semester at full-time (15 WTUs)</td>
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<td></td>
<td>Two (2) quarters at 50% of timebase (22.5 WTUs)</td>
<td>50% of timebase over AY total 15 WTUs</td>
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<td>50% of timebase over AY total 22.5 WTUs</td>
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A FERP timebase reduction may be requested. If granted, shall continue for remainder of FERP
### 2018-19 Academic Calendar Overview

**Academic Payment Schedule Fall 2018 - Spring 2019**

As a Cal Poly Pomona faculty member, you are either appointed for a semester or an academic year. How you are appointed determines your pay schedule. In general, an employee hired for one semester receives six equal pay warrants over a six-month period. An employee hired for an academic year receives twelve pay warrants over a twelve-month period. Below are the most common pay schedules:

#### Fall Only Appointment
Faculty working fall semester are paid in 6 equal payments

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>Pay Period Dates</th>
<th>Payday</th>
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<td>Dec-18</td>
<td>11/30/18 - 12/31/18</td>
<td>12/31/18</td>
<td>01/02/19</td>
<td>Fall - Warrant # 4</td>
</tr>
<tr>
<td>Jan-19</td>
<td>01/01/19 - 01/31/19</td>
<td>01/31/19</td>
<td>02/01/19</td>
<td>Fall - Warrant # 5</td>
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<tr>
<td>Feb-19</td>
<td>02/01/19 - 02/28/19</td>
<td>02/28/19</td>
<td>03/01/19</td>
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#### Spring Only Appointment
Faculty working spring semester are paid in 6 equal payments

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<thead>
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#### Academic Year Appointment
Faculty working a full academic year (AY) are paid in 12 equal payments

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<td>Aug-19</td>
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<td>02/28/19</td>
<td>03/01/19</td>
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</tr>
</tbody>
</table>

*Warrant #6 of 12 (6th pay warrant for Fall)*
2018-19 ACADEMIC CALENDAR OVERVIEW

The 2018-2019 Academic Year consists of 85 academic workdays during the Fall 2018 Semester and 85 academic work days during the Spring 2019 semester.

A Lecturer or AY Teaching Associate initially hired to teach Fall only and then appointed to teach Spring also, will be paid as if working an academic year.

a. The first warrant of the Fall Semester includes Academic Days worked August 20, 2018 through September 30, 2018.

b. Late starts, leaves without pay, or dock time during a semester can affect the 6th pay warrant for that semester. Time-base changes will affect the upcoming and future pay warrants.

c. The first warrant of the Spring Semester includes Academic Days worked January 22, 2019 through February 28, 2019.

d. The first warrant of the Spring Semester may vary in amount from Fall Warrant #5 due to a change in Time Base/Units from Fall to Spring.

e. The 12th warrant reflects the Time Base/Units of the preceding Fall appointment and the effect of any late starts, leaves without pay, or dock time during a semester which can affect the 6th pay warrant for that semester.
This document is designed to assist faculty/academic workers to understand your payroll schedule for 2017/18 and to provide you with information on how your pay will be issued under the semester schedule in 2018/19.

**Quarter Schedule**

*Academic Year Appointments*

*Fall 2017, Winter 2018 and Spring 2018*

With the quarter schedule, academic-year employees who work for a full academic year are paid 12 monthly paychecks in the following pattern:

- **Fall**
  - September
  - October
  - November
  - December

- **Winter**
  - January
  - February
  - March
  - August

- **Spring**
  - April
  - May
  - June
  - July

**Semester Schedule**

*Academic Year Appointments*

*Fall 2018 and Spring 2019*

With the semester schedule, academic-year employees who work for a full academic year are paid 12 monthly paychecks in the following pattern:

- **Fall**
  - September
  - October
  - November
  - December

- **Spring**
  - January
  - August

**Note:** When the fourth check for Winter Quarter or the sixth check for Fall Semester issues at the end of the academic year cycle, it is at the timebase for that term and not based on the time base for subsequent terms.
## Faculty/Academic Pay Schedules

**Settlements for One Quarter and Two Quarter Appointees to Change to Standard Pay Checks for Each Term**

Beginning with Winter Quarter 2018 and ongoing, Payroll will no longer process early settlements in order to avoid gaps in pay as we start to transition to the semester pay schedule. Also, by maintaining the normal paycheck schedule, we will also avoid potential gaps in coverage for single term faculty who have medical insurance through the University as part of the Affordable Care Act.

Each term, the paychecks will be split (four for each quarter, six for each semester) and paid in consecutive month order for these individual term appointments. Once we convert to the semester schedule, if a single term appointee receives an additional term appointment in the same academic year, the pay will follow the applicable pattern referenced above for academic year appointees.

**First Paycheck for Fall 2018**

Those teaching Fall 2018 will begin the term on August 20, 2018 and the first paycheck will be issued at the end of the September pay period (September 30, 2018). Likewise, those who start Spring 2019 semester will start the term on January 22, 2019 and the first paycheck for Spring will be issued at the end of the February pay period (February 28, 2019).
Health Benefit Eligibility for Temporary Academic Year (AY) Lecturers and Coaches

Qualifications:
- Appointed to at least .40 time base (Six WTU’s or greater) per semester
- Qualifying academic year appointments – Earliest benefit coverage effective date is October 1 and coverage is through September 30.
- Fall Appointment – Earliest benefit coverage effective date is October 1 through March 31.
- Spring Appointment – Earliest benefit coverage effective date is March 1 through August 31.
- The benefits effective date is the first of the month following the request to enroll submission date. Human Resources cannot request retroactive benefit coverage.

The benefits effective date is the first of the month following the request to enroll submission date. Human Resources cannot request retroactive benefit coverage.

Health Benefit Eligibility for Tenure Track Faculty and Librarians

There is no change to eligibility for Tenure Track Faculty and Librarians. Must be appointed at half time base or greater (7.5 WTU’s).
- Fall Appointment – Earliest benefit coverage effective date is October 1.
- Spring Appointment – Earliest benefit coverage effective date is March 1.
- The benefits effective date is the first of the month following the request to enroll submission date. Human Resources cannot request retroactive benefit coverage.
Additional Information and Resources

• Faculty/Academic Pay Schedule and Frequently Asked Questions (FAQs), on our Payroll Services Website

• Select Payroll Semester Conversion Information

• Payroll Contacts
  o Sandra Davis / sandradavis@cpp.edu
  o Mary Martinez / mamartinez@cpp.edu
  o Jane Self / jself@cpp.edu
Lecturer Entitlements and Course Offerings

• Entitlements (12.3)
• Careful Consideration (12.7)
• Order of Assignment (12.29)
Years 1 through 6 Entitlement (12.3)

Article 12.3 – part-time temporary faculty appointees have right to similar assignment following **2 semesters or 3 academic quarters** of **consecutive employment within an academic year**, within same department or equivalent unit at same campus

- After 12.29(a)(7) or (b)(7) Order of Assignment analysis, *if* offer an appointment, it shall be for one (year) and must be at same or higher pay rate
- To convert from AY to 12-month positions, must include 15% increase
- Conditional basis (relating to budget or enrollment)
- Entitlement not increased if during the term of the appointment the employee is assigned additional work up to full-time
- Full-time appointments are not conditional and do not have similar assignment right
Years 1-6 continued
Careful Consideration

• Article 12.7 – Careful Consideration
  ◦ Each department or equivalent unit shall maintain a list of temporary employees who have been evaluated by the department or equivalent unit
  
  ◦ Careful consideration must be provided to those who apply for a position in the department or equivalent unit
  
  ◦ **Important to sign the PAF Log Sheet after review of PAF**
Years 1-6 continued

• Article 12.8 – The list maintained by each department or equivalent unit pursuant to Article 12.7 of temporary employees shall also include the courses previously taught in the department.

• Article 12.9 – Appointment of a temporary employee in consecutive academic years to a similar assignment in the same department or equivalent unit shall require the same or higher salary placement than the previous appointment.
3-Year Appointments

• Article 12.12 – Temporary faculty (excluding coaches) employed during the prior academic year and possessing 6 or more years of prior consecutive service on that campus, shall be offered a 3-year temporary appointment following an evaluation conducted pursuant to Articles 15.20(d) and 15.28 where there is a determination by the appropriate administrator that a temporary faculty member has performed the duties of his/her position in a satisfactory manner; AND absent documented serious conduct problems.
3-Year Appointments continued

• In determining eligibility for a 3-year appointment, one year of service shall be considered employment of 1 semester or 2 quarters in Unit 3 on a single CSU campus, in a single department (includes equivalent unit) during a single academic year.

• The 6 years service must be consecutive. Units taught in extension for credit programs are not included as part of the entitlement base.
3-Year Appointments continued

• The term of the first 3-year entitlement based upon “similar assignment” and available work per 12.29 Order of Assignment

• Subsequent 3-year entitlements determined by time base held in 3rd year of the prior 3-year appointment

• In the event there is no work available to satisfy the time base entitlement during any academic term of the 3-year appointment, the temporary faculty member continues to maintain the entitlement for the duration of the 3-year appointment
3-Year Appointments continued

• If at the end of a 3-year appointment, no work exists to support a subsequent appointment or if the time base of the lecturer was zero during the 3rd year, s/he shall be placed on a departmental list per Article 38.48
  ◦ Requires official notification that no work exists to support the subsequent appointment, and shall inform the lecturer of the right to be placed on a list for 3 years
  ◦ Lecturer must inform his/her department chair by July 1st each year of his/her interest in and availability for employment; must include current contact information; failure to provide notice will result in removal from list
3-Year Appointments continued

Article 12.13 – Temporary faculty holding 3-year appointments shall be reappointed to a subsequent 3-year appointment (aka entitlement) following an evaluation conducted pursuant to Articles 15.20(d) and 15.29 where there is a determination by the appropriate administrator that a temporary faculty member has performed the duties of his/her position satisfactorily AND absent any documented serious conduct problems.
3-Year Appointments continued

• Article 12.13 Continued:
  ◦ These temporary faculty will be reappointed to a subsequent 3-year appointment unless there is insufficient work for which the faculty member is qualified. In the event there is insufficient work to support the reappointment at the previous time base, the time base of his/her successor 3-year appointment may be reduced to reflect available work for which the temporary faculty member is qualified.
3-Year Appointments continued

• Article 12.15 – No later than June 30\(^{th}\) of each year, the Administration shall post in each department a list of temporary faculty who it believes will be eligible for a 3-year appointment pursuant to Article 12.12 effective with the first appointment of the next academic year.

• Faculty who are omitted from the list but who believe they are eligible for a 3-year appointment shall identify themselves to the department chair within 30 days of the posting. The faculty member should provide any documentation in his/her possession which will assist in verifying eligibility.
• In the event the department determines that a need exists to assign new or additional work to temporary faculty after the assignment needs of tenured and probationary faculty (including FERP and PRTB faculty) have been satisfied, and after any work to be taught by administrators, teaching associates and other student employees, or volunteer faculty have been assigned, the work shall first be offered to qualified temporary faculty in the department who have performed satisfactorily in the following order:
Order of Assignment of Work

BEGINNING OF THE ACADEMIC YEAR

1. 3-year FT appointees per 12.12 and 12.13
2. Continuing multi-year (not 12.12 or 12.13) FT appointees
3. 3-year PT appointees per 12.12 or 12.13 up to the time base of the entitlement
4. Those on the recall list (Art. 38.48) up to time base of the entitlement of most recent 3-year appointment

DURING THE ACADEMIC YEAR

1. 3-year FT appointees per 12.12 and 12.13
2. Continuing multi-year (not 12.12 or 12.13) FT appointees
3. 3-year PT appointees per 12.12 or 12.13 up to the time base of the entitlement
4. Those on the recall list (Art. 38.48) up to time base of the entitlement of most recent 3-year appointment
Order of Assignment of Work continued

BEGINNING OF THE ACADEMIC YEAR

5. Continuing multi-year PT appointees (not 3-yr. per 12.12 & 12.13) up to time base entitlement
6. Visiting Faculty (see 12.32)
7. Give careful consideration to all PT and FT temp faculty with no multi-year appointments, employed in the prior academic year. Faculty in this group may be appointed in any order but must satisfy 12.3 rights up to TB entitlement. FT and PT faculty without 12.3 rights can be appointed to any time base or term.
   a. Those with 12.3 rights, if appointed, should receive a 1-year appointment, for same time base as prior year if work is available that they are qualified to teach.

DURING THE ACADEMIC YEAR

5. Continuing one-year full-time appointees; if insufficient work, partial or complete reduction does not require a layoff
6. Continuing one-year and multi-year PT appointees (not 3-yr. per 12.12 & 12.13) up to time base entitlement
7. Visiting Faculty (see 12.32)
8. Give careful consideration to all PT and FT temp faculty with no one-year or multi-year appointments, who were employed in the current or prior academic year. Can appoint anyone in this group in any order. FT and PT faculty without 12.3 rights can be appointed to any time base or term.
Order of Assignment of Work continued

BEGINNING OF THE ACADEMIC YEAR

8. Any remaining work is “new or additional work”. Offer the work in the following order:

i. To PT 3-year appointees up to and including 1.0 time base. If department has need to assign work for which a PT temporary faculty unit employee with a 1-year appointment is objectively determined to be demonstrably better qualified, the 1-year appointee may instead be assigned the work.

DURING THE ACADEMIC YEAR

9. Any remaining work is “new or additional work”. Offer the work in the following order:

i. To PT 3-year appointees up to and including 1.0 time base. If department has need to assign work for which a PT temporary faculty unit employee with a 1-year appointment is objectively determined to be demonstrably better qualified, the 1-year appointee may instead be assigned the work.
Order of Assignment of Work continued

BEGINNING OF THE ACADEMIC YEAR

8(ii) Next, offer to PT one-year appointees up to and including a 1.0 time base

iii. Next, offer to any other qualified candidate

DURING THE ACADEMIC YEAR

9(ii) Next, offer to PT one-year appointees up to and including a 1.0 time base

iii. Next, offer to any other qualified candidate
Entitlement Calculation Overview and Activity

Q2S Unit Entitlement Calculator

Enter Current Annual Quarter Unit Entitlement: 0
Calculated Time Base = 0
Corresponding Annual Semester Unit Entitlement = 0

Offer courses that a faculty member is qualified to teach, in accordance with the order of assignment, to meet the minimum unit requirement (you may need to exceed the minimum unit requirement to accomplish this).
Lecturers with Entitlements

**Annual Semester Entitlement = Annual Quarter Entitlement Divided by 1.5**

**Step 1:** Convert the annual entitlement to semester WTU’s.

*For example:*  24 Qtr entitlement / 1.5 = 16 Semester WTU’s per Academic Year.

**Step 2:** Determine the semester courses that the lecturer is qualified to teach and communicate this to the lecturer. There may be cases where a lecturer is not qualified to teach the semester version of a quarter course for which they were qualified. This affects available work and needs to be clearly explained to lecturers. Lecturers should also be reminded that entitlements are department specific.

**Step 3:** Make teaching assignments keeping in mind that two semesters instead of three quarters means less flexibility in distributing the entitlement over the AY.

**Step 4:** Be prepared to explain to lecturers that after conversion, the same entitlement might be met with a different number of courses than the under the quarter system. However, the total pay for the equivalent number of semester and quarter WTU’s will be the same.
Entitlement Exercise

Lecturer A has a 3-year contract with an annual entitlement of 28 WTU, and this has been met with seven 4-WTU courses distributed over the AY with no more than three courses per quarter (e.g. 3-1-3, 2-2-3, etc.). After conversion, the entitlement becomes 18.7 WTU, and the courses usually taught by Lecturer A have become 3-WTU courses. If these 3-WTU courses, after following the order of assignment, are the only available work for which Lecturer A is qualified to teach and are available in sufficient number, Lecturer A must be given seven (or more) of these courses over the year to meet the entitlement. Seven courses could result in either three courses in one semester and four in the other, or two courses in one semester and five in the other. The entitlement cannot be met with one course in first semester and six in the second. So a reasonable effort should be made to assign at least two courses in the Fall Semester (Step 3), assuming available work for which the lecturer is qualified.
Entitlement Exercise continued

Either case results in at least two courses per semester and at least four courses in one semester. Since under the quarter system, Lecturer A had taught at most three courses per quarter, Lecturer A may feel that workload has increased without a commensurate increase in pay. See Step 4. There is an aspect of more preps per term that is separate from WTU’s and dollars balancing, but this is not a topic of this workshop.

An increase from 18.7 WTU to 21 WTU may or may not affect a subsequent entitlement, depending on the year of the contract. If 21 WTU were assigned in the first or second year of the three-year contract, this additional work would not affect the entitlement for the remainder of the contract nor a subsequent contract (Article 12.5). The entitlement for a subsequent contract is based on the WTU’s of the third year (Article 12.12(c)).
Article 15

Periodic Evaluation relative to cumulative reviews

15.20 (d): Evaluation of temporary faculty unit employees for three (3) year appointments pursuant to Article 12.12 and 12.13.

15.28: Temporary faculty unit employees eligible for a three-year appointment pursuant to Article 12.12 shall be evaluated in the academic year preceding the issuance of a three-year appointment. This evaluation shall include student evaluations of teaching performance for those with teaching duties, peer review by a committee of the department or equivalent unit as defined in provision 15.2, and evaluations by appropriate administrators. The evaluation shall rate the temporary faculty unit employee as either satisfactory or unsatisfactory.
Satisfactory ratings may include narrative comments including constructive suggestions for development. This periodic evaluation shall consider the faculty unit employee’s cumulative work performance as evaluated during the entire qualifying period for the three-year appointment. A three-year appointment shall be issued if the temporary faculty unit employee is determined by the appropriate administrator to have performed in a Satisfactory Manner in carrying out the duties of his/her position. The determination of the appropriate administrator shall be based on the contents of the Personnel Action File and any materials generated for use in any given evaluation cycle pursuant to 15.8. Where the appropriate administrator determines that a Temporary Faculty Unit Employee has not performed his/her duties in a Satisfactory Manner, then the reasons for his/her determination shall be reduced to writing and placed in the Personnel Action File.
Article 15.29

• Article 15.29: same as Article 15.28 but evaluation occurs in the 3rd year of the temporary faculty member’s 3-year entitlement

• Best to early identify those due evaluations
Questions?
Contact Information

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