

State of California  
M e m o r a n d u m



**To:** David Wehner, Thomas Jones, David Christy,  
Mohammad Noori, Linda Halisky, Philip Bailey

**Date:** May 8, 2009

**File:** V:/Smrqrtr/Summer 2009 Appt Proc.doc

A handwritten signature in black ink that reads "Mike".

**From:** Michael H. Suess  
Associate Vice President for Academic Personnel

**Copies:** Robert Koob  
Dept. Heads/Chairs  
Al Liddicoat  
Richard Saenz  
Marc Benadiba  
Barbara Melvin  
Sharon Chan

**Subject: Appointment and Payroll Procedures for Summer Quarter 2009**

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Enclosed are sample letters to assist you in preparing Summer Quarter 2009 appointments. These letters are similar to those used last year, including language to address appointments of faculty who will be teaching courses compressed for less than the entire ten week Summer Quarter (e.g., 5 week courses).

A full-time instructional workload for all **tenured or probationary faculty** appointed to an **extra quarter assignment** will be based on 12 weighted teaching units. Part-time workload for tenured and probationary faculty will be based on  $x/12$  (for example: a 4 unit assignment would be  $4/12$ ). Probationary and tenured faculty are expected to perform normal instructionally-related responsibilities including research, scholarship, creative activity, and/or service to the University, profession and/or community. Compensation of **temporary faculty** shall be based on a full-time workload of 15 weighted teaching units.

If you are assigning a tenured or probationary faculty member to an 'instructional' assignment in class code 2368 (extra-quarter assignment with pay), please refer to the **summer quarter eligibility list** distributed November 2008 (located at <http://academic-personnel.calpoly.edu/Summer.html>). If a faculty member is listed as ineligible to teach, but is the **only** qualified person available to teach the course, **the dean may grant a waiver by completing the appropriate box on form API01S, Section III**. Appointments which are non-instructional in nature (e.g., Assigned Time, Administrative Time or other non-teaching time) are not restricted to the eligibility list.

To satisfy eligibility for benefits, class code 2361 (Instructional Faculty-12 month) will be used for **new tenure-track** faculty beginning employment during Summer Quarter **and appointed half-time or more**; class code 2358 (Lecturer AY) will be used for such appointments that are less than half-time (ineligible for benefits). Class code 2361 will be converted to academic year status, class code 2360 (Instructional Faculty – AY) effective Fall Quarter.

Also enclosed is the Summer Quarter Agreement between Cal Poly and CFA. Please note that MOU 21.5 (located at [http://www.calstate.edu/LaborRel/Contracts\\_HTML/CFA\\_CONTRACT/CFAtoC.shtml](http://www.calstate.edu/LaborRel/Contracts_HTML/CFA_CONTRACT/CFAtoC.shtml)) specifies that the summer agreement at Cal Poly SLO shall remain in effect. Thus, tenured and probationary faculty members may partially bank units taught in Summer 2009 to reduce workload during

the 2009-2010 academic year (see section 4.b). Also, lecturer assignments during the summer will not be credited toward lecturer entitlements (Article 21.23d), nor will the Angelo Order of Assignment be required in determining preference (Article 21.24) for summer appointments. Conditional appointments of lecturers may be extended only to part-time lecturers (Article 12.9). Moreover, Article 21.23c provides that WTUs taught by lecturers during the Summer term shall be credited toward SSI eligibility.

The following appointment procedures have been established for Summer Quarter 2009:

1. Dean's office forwards **Summer Quarter appointment letters** with the **API0IS** form to Academic Personnel.
2. Summer quarter **Contract Panels** must be completed in PeopleSoft. Enclosed is a copy of the Business Process Guide also available at <http://www.academic-personnel.calpoly.edu/BPG/BPG.html>
3. **Amendments** (subsequent change) of either increase or decrease in assignment, an amended letter and new API0IS should be resubmitted.
4. Copies of the **Accepted or Declined appointment letter** signed by the employee should be forwarded by the dean's office to both the Academic Personnel and Payroll Services offices.
5. **Department Head/Chair assignments** should provide pro-rata coverage over the entire Summer Quarter. When appointing an incumbent department head/chair for summer quarter with extra pay, please use payroll classification code 2368; their base salary rate will be the same as their June 2009 rate (which combines the chair stipend with base salary). For new department chairs, please contact Sharon Chan (6-5281) to compute their appropriate salary rate.

Enclosed is a copy of the **API0IS** form to document faculty appointments and assignments for Summer Quarter 2009. The API0IS form is available for downloading at <http://academic-personnel.calpoly.edu> under the Forms tab.

For completion of the API0IS form, please note the following:

I. **Section I, Personal Data**

Please provide employee Full Name, Requisition No/Position No ( refer to attached Summer Quarter Position Numbers) Empl ID number established in PeopleSoft, Job Code, Rank/Range, Department and Department ID.

**Job Codes** – Job classification codes for Summer Quarter assignments are below. For position numbers, refer to the attached Summer Quarter Positions for 2009

**2368 – Extra Quarter Faculty** - Academic rank faculty and/or lecturers (who have worked full-time all three quarters of the 2008-09 academic year or who have worked full-time Winter and Spring Quarters 2009), or PRTB faculty teaching an extra quarter (time-base is limited to PRTB time-base). 2368 is also used for those who were on sabbatical or difference-in-pay leaves during 2008-09.

*Paycheck issue dates: July 30, August 31, and September 11*

**2358 – Lecturers** - New lecturers or continuing lecturers who did not work full-time winter and spring terms of the 2008-09 academic year and/or new tenure-track faculty with summer assignments with less than half-time assignments should be appointed as a lecturer for summer term. Lecturers from the part-time pool will continue with the same part-time pool Position number. If the lecturer is an emergency hire, use the emergency position number.

*Paychecks issue: June 30, July 30, August 31, and September 11*

**2360: Instructional Faculty AY**

- **FERP** with summer appointments as their regular FERP assignment – only API01S is required (unless previously submitted).

*Paychecks issue: June 30, July 30, August 31, and September 11*

- **Full-time Banked Quarter** assignments should identify the full-time quarter in which the faculty member will be off for teaching summer quarter. API01S and letter required
- **Partial Banked Quarter** assignments are on a pro-rata basis of 12 WTUs. The quarter for which the teaching assignment will be reduced will be jointly determined by the faculty member and department head/chair and referenced in the letter of appointment for summer. API01S and letter required
- **Advance Quarter Off** must be full-time for the quarter off as well as the quarter worked. In rare occasions the college dean may grant a deferral of repayment of an advance quarter off until the next succeeding summer. API01S and letter required
- **Instructor Term Workload** – Advanced or Banked (Full or Partial) Quarter Off must be documented in Psoft in Instructor Term Workload
  - Navigation: Curriculum Management > Instructor/Advisor Information > Instructor Term Workload

**2354 - Teaching Associate**

*Paychecks issue: June 30, July 30, August 31, and September 11*

**2355 - Graduate Assistant**

*Paychecks issue: July 30, August 31, September 30*

**2361 - Instructional Faculty 12-Mo** - New tenure-track faculty with summer assignment of half-time or more (benefits eligible). Academic Personnel will supply the position number for these 12-month appointments as needed.

*Paychecks issue: June 30, July 30, and August 31*

**2. Section II, Work Assignment Action**

Select the appropriate Employment Type and offer letter for the assignment

- **Emergency Appointments** should include a justification for the assignment.

**3. Section III, Work Assignment and Pay**

**Total WTU/FTE** - Complete the WTUs for **IFF, IAF, AT** and **OSF** and add them together for the “WTU TOTAL ASSIGNMENT”.

- **Total FTE** - Calculate the Total FTE: Academic rank faculty teaching an extra quarter will have their teaching based on a full-time equivalent of 12/12. Lecturers will have their teaching based on a full-time equivalent of 15/15 (even if the lecturer is a 2368).
- **Waiver** – Complete waiver section if faculty member was not on summer quarter eligibility list
- **Teaching Assignment Dates** are to be completed only for assignments scheduled for less than the entire quarter; e.g. 5 week courses. This will not affect pay dates.
- **Payroll Assignment Dates** are to be completed **only** if there is a late start or early end of assignment.
- **PeopleSoft Contract Data** - all WTUs must be converted to a 15 WTU base (conversion provided on API01S)

- Example: 12 WTU for tenured and probationary faculty should be entered in the contract as 15 WTU for full-time.
- To convert a WTU less than FT to a 15 WTU base:  
Multiply the WTU by 15 and divide by 12 (e.g. 4 WTU x 15 divided by 12 would equal 5 WTU to be entered into the PSoft Contract 'Total WTU' field).
- **IAF, AT and OSF** must be entered in Instructor Term Workload
  - Navigation: Curriculum Management > Instructor/Advisor Information > Instructor Term Workload

Please contact Sharon Chan (ext 6-5281) or me if you have any questions regarding the Summer Quarter 2009 appointment process.

Enclosures:

Cal Poly Agreement for Summer Quarter Faculty Assignments (effective Summer 2007) (<http://academic-personnel.calpoly.edu/Summer.html>)

API01-S Form (<http://academic-personnel.calpoly.edu/> → Forms tab)

Sample Summer Quarter 2009 Appointment Letters

Summer Quarter Position Numbers

Create a Summer Qtr Contracts BPG (<http://www.academic-personnel.calpoly.edu/BPG/BPG.html>)

References:

Summer Quarter eligibility lists are located at <http://academic-personnel.calpoly.edu/Summer.html>

Faculty collective bargaining agreement: [http://www.calstate.edu/LaborRel/Contracts\\_HTML/CFA\\_CONTRACT/CFAtoc.shtml](http://www.calstate.edu/LaborRel/Contracts_HTML/CFA_CONTRACT/CFAtoc.shtml))