

Load Balancing Procedures for Full Time Faculty

Reference LRCFT – 4.6.2 for specifics.

Due to the complexities related to course scheduling, classroom faculty can “balance” their load requirement over four semesters. What this means is that for any given term in the four term period, their regular load might be higher or lower than 15 formula hours or 1.0 FTE. But when the loads for all four terms are added together, they will total 60 formula hours or 4.0.

Load balancing can occur because a low-enrolled class is cancelled or because the FTE associated with the scheduled classes for a given term is slightly above or below 1.0 or 15 formula hours. Load balancing is not the same as load banking.

Over a two year (four semester) period, a full-time faculty credit load is 60 formula hours. At the end of each two-year period, formula hours ***greater*** than 60 in the instructional mode (by an amount equivalent to or greater than .067 FTE or 1 formula hour) shall be paid as overload (Schedule B) via a memo from the Vice President of Instruction.

In the uncommon occurrence in which a faculty member may be ***below*** 60 formula hours at the end of the two-year load balancing period (by an amount equivalent to or greater than .067 FTE or 1 formula hour), when possible, the balance left should be completed the Summer term following the end of the two year load balancing period. If the balance left cannot be finished in the Summer term, it may be necessary to complete the balance the following Fall/Spring semester. If so, this is only allowed by mutual agreement of all parties, by completing the “Load Balancing Agreement – Teaching 60 Formula Hours over a Four-Semester Period” (P-144) form (available at the Los Rios Human Resources website). Otherwise, a loss of pay must be reported to HR and Payroll for processing via a memo from the Vice President of Instruction.

Load balancing totals with formula hours between 59.0 to 61.0 ***will not be adjusted***. However, if paying off or reporting a loss of pay, the full amount (in excess of 60 or short of 60) is considered.

HR/Fiscal have agreed with the colleges to change the way we receive documentation to pay off load balancing. Previously, we received TCSs. Effective Fall 2009 we will accept a memo from the Vice President of Instruction Office with specific information.

Since the load balancing FTE is FTE that are overload earnings, the FTE paid for this balance of contract will be counted towards Salary Step Advancement on Schedule B.

Load balancing periods end with the Spring semester of an even year (Spring 2008, Spring 2010, etc.). Periodically, instructors have requested to be paid outside of the two-year payment period. This can occur with an approved memo from the Vice President of Instruction (Steps 1-3 of these procedures are to be followed). Refer to the Human Resources Information Flyer #4 “Load Balancing – 60 Formula Hours Over a Four-Semester Period” (available at the Los Rios Human Resources website).

Excess load should not be paid by splitting a class between regular load and overload. For example, an instructor who has .10 excess regular load should not have a .20 lecture class split where half the hours are regular load and the other half paid as overload. However, a whole lecture or lab component of a class can be assigned as overload while the other component is regular load.

Step 1. – College Instruction Office

By the last working day in April or November (only for exception payments), the Vice President of Instruction must provide an approved memo to the Human Resources Officer, Employment, which states the following information:

- Employee Name
- Employee ID#
- Position Number
 - For Payouts - use overload position numbers, this will ensure that the employees will be paid out of the appropriate budget number.
 - For Type C Banking – use Type C position numbers.
- Formula Hours
- FTE to be paid (this is Formula Hours divided by 15 = Total Formula Hours for 4 semesters, then take Total Formula Hours minus 4 (4 FTE is 2 semesters at 100%) = extra FTE to be paid) (Example: Formula Hours 61.00 divided by 15 = 4.0666, then take 4.0666 minus 4 = .067 FTE is the remaining to be paid.
- Lecture Hours to be Paid (this is the FTE multiplied by 270) (FTE calculations for lecture are based on 270 hours per semester, which is the equivalency of a full-time load.) Note: this number should be out 2 decimal places.
- List if the employee is Banking Type C or being Paid Out

*Note: An instructor can request that the excess load be banked for Type C Leave rather than paid (the appropriate approval Type C Banking request(s) **must** be submitted along with the approved memo to Human Resources Officer).*

Step 2. – Human Resources

Once the memo is received Human Resources will input into PeopleSoft. Human Resources will input the “balance of contract” into PeopleSoft using Employee ID/Name, Position Number, FTE, Start and End Date, Salary Grade/Step, Retirement codes, etc.

Note:

- If payment is for Fall (only for exception payments), dates will be: Hire 12/1/XX and Termination 12/XX/XX (Use last day of the semester – see Academic Calendar).
If payment is for Spring, dates will be: Hire 5/1/XX and Termination 5/XX/XX (Use last day of the semester – see Academic Calendar).
- When paying the load balance, it is always paid as the Lecture Hourly Overload Assignment (B-1 Salary Schedule) rate. (There should not be any load balancing for Counselors, Coordinators, Nurses or Librarians.)
- When inputting into PeopleSoft, ensure to use the “position override” button and type in “LB” under the “sub job code” field (under the Job Information tab).

- The Load Balancing Memos (authorizations) will be scanned and saved in the J Drive under: Employment>Load Balancing, then a folder will be made for the appropriate year and the scanned document will be saved with the title containing the campus initials.
- The Human Resources Officer in Human Resources will give a copy of the memos/spreadsheets to:
 1. Benefits so that they can manually accrue sick leave for these overload payments.
 2. Payroll so that they can check lecture hours to be paid after they are entered by the Instruction Office on the worksheets.
 3. Fiscal Services so that they can determine whether the load balancing will affect how Fiscal carries load balancing over for the next semester's access report.
 4. If there is any banked FTE towards Type C leave, HR Specialist III, Certificated/Management receives a copy of memo/spreadsheet so that they can enter the Type C Banking into PeopleSoft.
- For late submissions, the Human Resources Specialist(s) will need to notify the HR Analyst ***and*** take into account the increased FTE to see if this changed the employees Step Placement for a new semester.

Step 3. – College

Once Payroll Worksheets are created for December or May, the Instruction Office will need to write onto the worksheets the accurate number of lecture hours to be paid.

Created: 11/2009; Revised: 3/10; 5/10; 2/11; 5/11; 5/13; 9/15