HOFSTRA UNIVERSITY
FACULTY LOAD REPORT REVIEW GUIDE AND CHECKLIST

(1) Load Sequence:
- Verify that the proper load sequence and date are being reviewed.

(2) Faculty Type and Address:
- Verify that the faculty type is accurate, (i.e. F/T faculty, Adjunct, Administrator, Teaching Administrator, etc.)
- Verify that the home department, address, and contact information are accurate.

(3) Annual Base Load Summary:
- Verify that the projected annual load is accurate (normally 18 for F/T faculty).
- Verify that the fall and spring distribution of projected annual load is accurate (normally 9 / 9).
- Faculty should be teaching at least 6 regular class hours per term (non-ISP), otherwise Provost’s approval is required in advance.
- Summer or January teaching towards base load should be approved in advance by the Provost Office.
- Verify that any Owed Hours have been incorporated into the projected loads. A faculty member should not incur greater than 3 owed hours per term without prior approval of the Provost Office.
- Total owed hours should not exceed 6 semester hours, for up to 2 years.

(4) Rate and Load Summary:
- Verify that the proper overload rate is present for the appropriate rank.
- Verify that the maximum load per term is accurate (normally 16 for F/T or 8 for adjuncts).
- Verify that the maximum load is not being exceeded. All workload items count towards the maximum load.
- Review the current term load summary, released time, banked time, per capita load, and owed hours.
- Aged owed hours should be reviewed with the Chair and a written plan of action should be on file detailing a payback plan in the near future.

(5) On-load Teaching Detail:
- Verify that this particular faculty member is assigned to the correct courses, proper meeting times, proper student credits, proper faculty loads, and budget numbers.
- For faculty load, verify that cross-listed courses are reflected at no more than the faculty load for one course, EMBA courses have agreed-upon loads (1.5x), cluster courses contain the additional coordination hour, Article 6.14 (if applicable) is properly reflected based on the course enrollment, and courses with low enrollment have been adjusted to either reduced variable load or ISPZ per capita.
- Verify that any Honors Options are reflected properly.
(6) **Released Time and Banked Hours:**
- Verify that any released time shown is proper or note if any expected released time is missing.
- Verify that when Article 6.18 released time (junior leave) is being taken, that no overload is resulting in that term.
- Verify that when Article 6.19 released time (tenured leave) is being taken, no overload is resulting in either the fall or spring semesters during that academic year.
- Verify that banking requests are reflected properly. Up to four (4) hours can be banked per term during the fall and spring and the total bank balance cannot exceed nine (9). Banked hours expire 3 years from the end of the original deposit term. Summer banking cannot exceed 3 hours from either SSI or SSII.
- Verify that sufficient workload within the term exists before considering any banking requests. The workload for consideration should only include the total on-load equivalency plus any associated released time.
- Verify that when a load shortfall exists (total on-load equivalency plus released time < projected load), all per capita courses have been moved to the on-load section to minimize any owing of hours.

(7) **Independent Study Section:**
- Verify that this particular faculty member is assigned to the correct course, proper meeting time, proper student credit, proper faculty load, and budget number.
- Verify that when a load shortfall exists (total on-load equivalency plus released time < projected load), all per capita courses have been moved to the on-load section to minimize any owing of hours.
- Verify that any Honors Options are reflected properly.
- When trying to minimize a load shortfall by moving ISP courses towards load, Banner will auto-apply regular ISP courses first, then ISPZ, then honors' options. There may be other alternative combinations that result in a lower shortfall for a term due to the different ISP point levels. Ultimately, the last review of a shortfall situation should include a manual review to see if a different combination would result in the smallest shortfall of owed time.

**General Notes:**
1) It is expected that approved audit schedules contain all necessary adjustments to faculty load before a term begins (i.e. FYC clusters, Article 6.14, cross-listing, EMBA, correcting zero course loads where appropriate, etc.) This greatly reduces the need for manual adjustments and/or delays in pay.

2) When considering if a person has met their projected load for a term, the ordering of loads begins with true on-load teaching, released time, per capita teaching (required to be converted to on-load if a shortfall exists), and then redeemed banked hours.

3) Should a manual pay adjustment be required, the course, faculty workload, rate, and pay calculation, should all be clearly labeled and approved by the associate dean.

4) Weekly monitoring reports which help to identify non-compliant situations with respect to the CBA should be reviewed each week and immediate action should be taken to correct and adjust loads. Reports include:

   - Faculty Underload (w/ISPws)
   - Courses with Invalid ISP Codes
   - Aged Owed Hours
   - On-load Courses with Enrollment < 7
   - Courses without Faculty Assigned
   - Faculty Exceeding CBA Maximum Load
   - Banking Requests Exceeding Available Load
   - Active Faculty with Term. Date/Non-Active ft Faculty

5) The load card printing process includes any situation that results in a pay change, projected load change, ISP enrollment change, enrollment changes for on-load courses <9, and any change in the "Adjunct Load or Full-Time over/underload" row.
# Faculty Load Report for Academic Year 2012-2013

**Fall Semester 2012**  
**Processed:** 01/06/2013  
**Printed:** 03/26/2013  
**Seq:** 80

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Home Dept</th>
<th>Faculty Type</th>
<th>Rank</th>
<th>Office Hours</th>
<th>Home Phone</th>
<th>Campus Addr</th>
<th>Total extra/adj pay</th>
<th>Adj/Overload Rate</th>
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<td></td>
<td></td>
<td></td>
<td>Full-Time faculty</td>
<td>Associate Professor</td>
<td>NONE</td>
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<td>1,923.00</td>
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<table>
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<tr>
<th>Annual Baseload: 18.00</th>
<th>(includes owed hours)</th>
<th>Fall</th>
<th>Jan</th>
<th>Sprng</th>
<th>S1</th>
<th>S2</th>
<th>S3</th>
<th>Total</th>
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<tr>
<td>9.00</td>
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### Onload Detail:

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<tr>
<th>Onload</th>
<th>Code</th>
<th>Name</th>
<th>Credits</th>
<th>Hours</th>
<th>Budget</th>
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<tr>
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<td>ITAL</td>
<td>ELEMENTARY ITALIAN 1</td>
<td>TTH 14:20 15:4</td>
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<td>3.00</td>
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<tr>
<td>94224</td>
<td>ITAL</td>
<td>INTERMEDIATE ITALIAN</td>
<td>TTH 12:45 14:1</td>
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<td>3.00</td>
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<tr>
<td>93497</td>
<td>ITAL</td>
<td>ADVANCED READING</td>
<td>TTH 16:30 17:5</td>
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<td>3.00</td>
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</table>

### Meeting Times:

- **TTH 14:20 15:4:** 19 hours
- **TTH 12:45 14:1:** 12 hours
- **TTH 16:30 17:5:** 8 hours

### Total Std Fac

<table>
<thead>
<tr>
<th>ISP</th>
<th>Enr</th>
<th>Cred Load</th>
<th>Budget</th>
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<tr>
<td>1219</td>
<td>0.00</td>
<td>3.00</td>
<td>22</td>
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<tr>
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<tr>
<td>1219</td>
<td>0.00</td>
<td>3.00</td>
<td>22</td>
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</tbody>
</table>

### Total onload, release time etc:

- **9.00** hours

### Independent Study Paid

<table>
<thead>
<tr>
<th>At Per Capita Rates:</th>
<th>Total Std Fac</th>
<th>ISP</th>
<th>Enr</th>
<th>Cred Load</th>
<th>Budget</th>
<th>Eqv+</th>
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<tr>
<td>92287 ITAL 116</td>
<td>01 ADVANCED READINGS</td>
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<td>3.00</td>
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### Notes:

- Faculty requested conversion to onload.
- Released Time/Administration Activity/Banked Hours:
  - Hours: Budget

Total onload, release time etc: **9.00**

Adjunct Load or Full-Time over/underload: **0.00**

Chairperson's Signature: **Date:**

Dean's Signature: **Date:**