

UNIVERSITY OF THE PHILIPPINES
 QUEZON CITY

OFFICE OF THE PRESIDENT

21 July 1992

MEMORANDUM NO. 40

TO : Chancellor Emerlinda K. Roman, UP Diliman
 Chancellor Ruben B. Aspiras, UP Los Baños
 Chancellor Ernesto O. Domingo, UP Manila
 Chancellor Francisco Nemenzo, UP Visayas
 Vice-Chancellor Milagros D. Iba, UP Diliman
 Vice-Chancellor Fernando K. Sanchez, UP Los Baños
 Prof. Julita E. Yabes, UP Manila
 Vice-Chancellor Jose N. Endriga, UP Visayas

SUBJECT: COMPILATION OF ALL RULES AND GUIDELINES FOR
 OVERLOAD AND SUMMER TEACHING HONORARIA

The Board of Regents in its 1048th meeting on March 26 1992, approved new rates and policies for overload and summer teaching. The approval included the provision: "... the President shall have the authority to impose additional conditions and rules covering the payment of overload and summer teaching honoraria..."

The intantion of this memorandum is to put together in one document the policies and rates approved by the Board of Regents in March 1992 and the new additional guidelines issued by the President:

I. GENERAL POLICIES:

- 1.1 As a matter of policy, the University discourages overload teaching by its faculty members. High quality student and faculty performance are best assured when faculty members take on combined teaching, research, extension, administration and study loads within the normal load of 24 units per academic year.

✓ 1.2 Academic administrators should distribute teaching assignments as equitably as possible among faculty members. While small classes might be best for academic reasons, the reality of budget constraints dictate that as much as possible, small classes should be avoided or offered only once a year.

✓ 1.3 Constituent University administration should study faculty work load distribution and where necessary, reallocate vacant faculty items to overloaded colleges or departments.

✓ 1.4 If, in spite of efforts to avoid overload teaching, a faculty member has to render overload teaching, then there should be reasonable compensation for it.

2. GENERAL FORMULA FOR OVERLOAD/SUMMER TEACHING HONORARIA:

2.1 BENCHMARK RATES PER FACULTY RANK

The honorarium rates for overload and summer teaching shall be pegged to the basic salaries of faculty members. However, to keep things simple, there shall be only one rate per faculty rank. Thus, there shall be only one rate for all Instructors (regardless of step or salary grade), another rate for all Assistant Professors (regardless of step or salary grade), etc. The rate for each rank shall be pegged to some "benchmark" SSL grade as shown below:

BENCHMARK SSL GRADES (FOR OVERLOAD/SUMMER TEACHING HONORARIA)

INSTRUCTORS	GRADE 16
ASST. PROF.	20
ASSOC. PROF.	24
PROFESSORS	28

✓ 2.2 DISTINCTION BETWEEN REGULAR RATES AND OFF-HOURS RATES

To continue a long-time practice, there shall be a distinction between REGULAR RATES (formerly known as "day rates") and OFF-HOURS RATES ("night rates"). Regular rates shall apply to teaching within regular office hours, i.e. 8am-12noon and 1pm-5pm, Monday to Friday. Outside these hours and days, the higher off-hours rates apply. The higher rate is used to encourage full utilization of classrooms by giving additional incentives for teachers to accept class schedules outside the usual hours and days.

2.3 REGULAR RATES FOR OVERLOAD/SUMMER TEACHING:

Consistent with the policy used for deriving the rates for lecturers, we assume: ten months of the year, 2/3 of regular faculty time is for teaching. The remaining time is for other *duties and* entitlements of regular faculty: research, *extension*, administrative work, attendance in faculty meetings, committee work, study leave, sick leave, *sabbatical*, teacher's leave, etc.

Thus, we might say the $(10/12) * (2/3)$ or 55.5% of the annual salary of a regular faculty member may be considered as payment *for teaching* 24 units per year. To derive the HONORARIA RATE PER UNIT:

INSTRUCTORS	:	55.5% of GRADE 16 ANNUAL SALARY divided by 24.
ASSISTANT PROFESSORS	:	55.5% of GRADE 20 ANNUAL SALARY divided by 24.
ASSOCIATE PROFESSORS	:	55.5% of GRADE 24 ANNUAL SALARY divided by 24.
PROFESSORS	:	55.5% of GRADE 28 ANNUAL SALARY divided by 24.

NOTE: The actual rate to be paid shall be rounded to the nearest ten pesos.

2.4 OFF-HOURS RATE = 1.20 OF "REGULAR RATE" (rounded to nearest ten pesos)

2.5 SUMMER HONORARIA = OVERLOAD TEACHING HONORARIA

It is understood that the distinction between regular rate and off-hours rate shall continue to be used during the summer session.

NOTE: The actual honorarium rates may be seen in the attachment.

GENERAL RULES ON CLASS SIZES AND CREDIT LOAD MULTIPLIERS

In the face of tight budget constraints, the University has no choice but to impose rules on minimum class sizes. In general, before an undergraduate class is opened, there must be at least ten (10) students and for a graduate class, at least five (5) students. Present University rules require that any exceptions to this rule must have the SPECIAL APPROVAL of the Chancellor on or before the last day of registration. The offering of small classes should be avoided.

4.1 If the offering of a graduate course with less than five (5) students cannot be postponed or avoided, then the teaching load credit for the teacher equals the course credit. That is, there shall be no credit load multiplier. This rule is presently in force and is only being reiterated here. **THERE SHALL BE NO EXCEPTION TO THIS RULE.**

4.2 If a graduate class has five to nine (5-9) students, then the teaching load credit shall be 1.25 times that of the course credit.

4.3 If a graduate class has ten (10) or more students, then the teaching load credit shall be 1.50 times that of the course credit.

In all these cases, it is understood that only officially registered graduate students fully paid as of the last day of late registration shall be counted. Auditors or sit-ins shall not be counted.

4.4 Thesis advising (undergraduate and graduate level) shall not be given any teaching load credit.

4.5 A faculty member who combines, merges or meets two or more sections as one class shall be credited for teaching one section only.

4.6 It is assumed that all the rules in this memorandum apply to classes where there is a teacher who actually meets the class. Thus, "supervised-study" classes where a teacher may meet a student for, say, only 2 hours per semester are not covered by these rules.

5. CREDIT LOAD MULTIPLIERS FOR GENERAL EDUCATION COURSES

Teachers of general education (GE) courses with at least twenty-five (25) students shall be credited with a teaching load credit equal to 1.33 times the GE course credit. However, this 1.33 GE multiplier shall not be used for meeting the normal 12-unit load requirement of faculty members. The multiplier shall be used ONLY for claiming overload or summer teaching honoraria.

This distinction is important to avoid reducing unduly the teaching capacity of colleges handling GE courses. The aim of the 1.33 GE multiplier is not to reduce the teaching loads of GE teachers but to increase their compensation.

For instance, if a GE teacher (without the benefit of the 1.33 multiplier) meets his/her 12-unit normal load by teaching four (4) subjects a semester, they he/she should continue to teach four subjects. If at least one of his/her four courses is a GE subject, then with the use of the

multiplier, the faculty member shall get additional compensation. The multiplier cannot and should not be used as a basis for reducing the faculty load, say, from 4 courses down to 3 GE subjects.

6. CREDIT LOAD MULTIPLIERS FOR LARGE CLASSES

If a lone teacher, by himself/herself, handles a large class (forty or more students), then he/she shall be entitled to a credit load multiplier determined as follows:

CREDIT LOAD MULTIPLIER = $\text{MIN} [2, 1 + (N - 40) / 120]$
where N is the number of students

Thus, an undergraduate class with one hundred forty (140) students entitles the teacher to a 1.83 multiplier. That is, if the course credit is 3 units, the teacher actually earns 3×1.83 or 5.49 teaching units. If the 3-unit class is also a GE course, the teacher earns the credit $3 \times 1.33 \times 1.83 = 7.33$ teaching units.

The maximum multiplier is 2.00 and it is attained when class size reaches 160. It is deemed non-optimal for one faculty member to have more than this number of students. To handle classes with 161 or more students, a graduate or teaching assistant should be hired. In any event, 2.00 is the maximum value of the multiplier for large classes.

7. TEACHING LOAD REDUCTIONS

7.1. THE MONETARY VALUE OF CREDIT LOAD REDUCTIONS

A faculty member given non-teaching (administrative or research) assignments by the University may be granted administrative load credit (ALC) or research load credit (RLC). The monetary value of this ALC or RLC shall be deemed to compensate such assignments, either partially -- or, in some cases, fully.

For instance, a faculty member granted a 3-unit ALC may be deemed to have been compensated, partially or fully, with the equivalent of one-fourth (1/4) of his regular faculty salary. If such a faculty member has a regular monthly salary of P10,000, the 3-unit ALC is already equivalent to P2,500 per month. In recommending ALC for administrators, deans and Chancellors must take into account this monetary value of ALCs. In considering any faculty member for overload teaching honoraria, the maximum combined sum of ALC and RLC which will be counted is 12 units per semester.

Still and all, there remain cases where even the AIC or RLC will not be deemed enough compensation. In this situation, additional compensation may be granted but this must be cleared with the constituent university or U.P. System Fiscal Policies and Operations Committee (FPFC). The grant of AIC is also subject to other rules.

7.2 OVERLOAD TEACHING BY FACULTY ADMINISTRATORS:

The administrative load credit (AIC) given a faculty administrator, whether a full-time or a part-time administrator, shall be counted as part of his/her total load credits. Any teaching load credit over the normal 12 units per semester shall be compensated with overload teaching honoraria -- subject only to the other limits (e.g. the rules on credit load enumerated above, the annual cap of of 18 units of overload and summer teaching per year, etc.) which apply to regular faculty members, provided that not all of an administrator's teaching load is done within regular office hours.

7.3 OVERLOAD TEACHING BY FACULTY RESEARCHERS:

The research load credit (RLC) given a faculty member shall NOT be counted in determining overload teaching credit if the faculty member receives honoraria (regardless of the source of the honoraria) for the research for which the RLC was granted.

However, if the faculty member does not receive honorarium from any source (U.P. or outside the U.P.) for such research, then the RLC, up to a maximum of three (3) units per semester, may be counted provided that:

- i. the research is officially recognized by University administration and
- ii. a progress or final report on that research has been submitted by the faculty member and accepted by the proper authorities or bodies BEFORE the overload honorarium payment is made.

7.4 ADMINISTRATORS/RESEARCHERS TEACHING IN THE SUMMER

During the summer session, all faculty members (including those who have research or administrative duties) shall be entitled to summer teaching honoraria for their entire summer teaching load.

7.5 STUDY LOAD CREDITS (SLC):

Study load credits (SLC) are given to student faculty members so they can have more time to study and finish their degree programs in the shortest time

possible. The SIC were not max. as additional compensation. As a general rule, faculty members with SIC should not be assigned any overload teaching. If a student faculty member is being considered for overload honorarium, the SIC shall not be counted -- EXCEPT under an emergency situation as in the following example: a faculty member, in the middle of a semester, leaves the service (for whatever reason), and the department cannot find a replacement/substitute except a faculty student. In this case, the student faculty member should be compensated additionally.

(OLD RULE)

8. MAXIMUM OVERLOAD AND SUMMER TEACHING WHICH WILL BE PAID

To protect faculty members from being assigned too much teaching and to prevent teachers from voluntarily taking on too much teaching to the detriment of teaching efficiency and effectiveness, there shall be limits on the overload and summer teaching which will be compensated with honoraria. There shall be limits per semester/trimester/term/summer session and limits per schoolyear.

- a. No faculty member shall be paid overload honoraria for more than nine (9) teaching units of overload per semester/trimester or more than six (6) units per term.
- b. For the summer session no faculty member shall be paid summer teaching honoraria for any load beyond two courses or 9 teaching units.

The limit on the number of courses is imposed to prevent faculty members from being saddled with, say, three undergrad courses totaling 9 teaching units. In the summer such a load would translate to an unreasonable number of teaching hours per week.

- c. However, IN NO CASE SHALL A FACULTY MEMBER BE PAID OVERLOAD OR SUMMER TEACHING HONORARIA BEYOND A COMBINED TOTAL OF EIGHTEEN (18) TEACHING UNITS OF OVERLOAD AND SUMMER TEACHING OVER ONE SCHOOLYEAR (12 MONTHS, STARTING WITH THE FIRST SEMESTER). In reckoning this absolute annual cap, all credit loads (teaching, research, administration, study, etc.), including summer teaching, in all units and programs of the U.P. System shall be counted.

A faculty member who handles, in one schoolyear, an actual teaching load of 30 teaching units (12 units per semester and, say, 6 units in the summer) is deemed to have a full load. Such a faculty member cannot be expected to perform at optimal level if he is also saddled with too much overload. More than 18 units of overload and summer teaching in one schoolyear is

considered excessive -- unhealthy and/or unfair for the teacher and the students.

PAYMENTS FOR OVERLOAD TEACHING HONORARIA AT THE END OF THE FIRST SEMESTER

As a rule, every regular full-time faculty member must count for 24 units of credit load per school year (12 months). Theoretically, the total credit load of a faculty member cannot be computed and payment for overload cannot be made until the end of the second semester.

However, the payment of overload teaching honoraria may be authorized by the Chancellor at the end of the first semester provided there is no likelihood that the faculty member will exceed the annual cap of 18 units on overload and summer load or if there is no likelihood that he/she will be underloaded in the second semester.

THE SUBMISSION OF ALL GRADES AS A PRECONDITION TO PAYMENT

It is understood that no faculty member shall be paid for overload or summer teaching honoraria until the faculty member shall have submitted all grades.

RESPONSIBILITY OF DEPARTMENT CHAIRMEN AND DEANS

- a. It is understood that before a department chairman and/or dean authorizes any overload or summer teaching, he/she must first verify that the overload is unavoidable and necessary, that a sufficient number of students need the courses in the particular semester and that no other classes can be merged or postponed to the next semester.
- b. Although pedagogical considerations may favor small classes, the reality of budget constraints should not be ignored. SPLITTING OF SECTIONS SHOULD BE AVOIDED.
- c. Every application for overload teaching/summer honoraria shall be accompanied by the following certification by the department chairman and the dean:

"I hereby certify that the teaching load for which the faculty member is being recommended for overload or summer honoraria is necessary and unavoidable considering all resources presently available to our unit and the reasonable needs of students."

12. IF A DEPARTMENT OR COLLEGE HAS TOO MUCH OVERLOAD OR TOO MANY LECTURERS OR TOO MANY SMALL CLASSES

Any college or department where the sum of overload teaching and lecturers' teaching loads (as measured in terms of actual teaching units) is more than 20% of the total actual teaching load, or where the average undergraduate class is less than 10, or where the average graduate class size is less than 5 in the college or department, shall be subject to a management audit by the Office of the Chancellor.

The findings and recommendations of this committee shall be reported to the Chancellor and the President. The findings shall be considered in the review of faculty staffing base levels as mandated in U.P. Administrative Order 24 (26 June 1992).

13. ADDITIONAL RULES

Nothing in this memorandum removes the right of the Chancellor, the President and/or the Board of Regents to impose rules which have not been explicitly or impliedly repealed by this memorandum or to formulate other rules which shall ensure that class schedules, class sizes and/or teaching loads are determined judiciously -- taking into consideration the reasonable needs of students, the department/ college and/or the curricular program and not the mere convenience of individual faculty members.

14. DATES OF EFFECTIVITY

The GC multiplier and the new rules for large classes shall be effective June 1 1992.

All the others are effective as of November 1, 1991.

(SGD.) JOSE V. ABUEVA
President.

Attachment: NEW RATES

NEW RATES FOR OVERLOAD AND SUMMER TEACHING HONORARIA
 (Effective 1. November 1991)

REGULAR RATE PER UNIT

FACULTY RANK

APPROVED RATES

INSTRUCTORS	P 1,330
ASSISTANT PROFS	1,890
ASSOCIATE PROFS	2,810
PROFESSORS	4,210

OFF-HOURS RATE PER UNIT

APPROVED RATES

INSTRUCTORS	P 1,590
ASSISTANT PROFS	2,270
ASSOCIATE PROFS	3,370
PROFESSORS	5,052

* NOTE: OFF-HOURS RATE = 1.20 * REGULAR RATE

OFF-HOURS MEANS OUTSIDE 8-12, 1-5PM ON WEEKDAYS.

As approved by the Board of Regents on 26 March 1992

ALC-RIC

ATTN.: JULIE

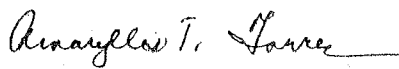
UNIVERSITY OF THE PHILIPPINES
DILIMAN QUEZON CITY
Tel. No. (632)99-28-89
Fax: (632)99-28-63

OFFICE OF THE VICE-CHANCELLOR FOR ACADEMIC AFFAIRS

25 March 1996

MEMORANDUM NO: 96-19

TO : All Deans, Directors, Heads of Units

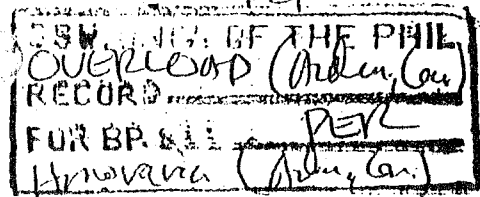

FROM : AMARYLLIS T. TORRES
Vice-Chancellor for Academic Affairs

SUBJECT : REVISION OF THE RULE ON MAXIMUM OVERLOAD AND
SUMMER TEACHING HONORARIA

=====
Attached herewith is a copy of the Revised Rule on Maximum Overload and Summer Teaching Honoraria. This was approved by the Board of Regents in its 1092nd meeting held on 29 November 1995.

All new claims for overload teaching will now be based on these revised guidelines.

For your information and guidance.



Excerpt from the Minutes of the 1091st Meeting of the Board of Regents held on 24 October 1995 as approved at the 1092nd meeting on 29 November 1995,

VI. POLICY MATTERS FOR APPROVAL BY THE BOARD

The following matters were submitted for APPROVAL by the Board, its action being indicated at the end of each item:

F. Proposed Revision of the Rule on Maximum Overload and Summer Teaching Honoraria

The proposed revision essentially consists of the following:

- JCB
- a. Modification of the portion of the rules prescribing the maximum overload teaching per Semester, Trimester and Summer; and
 - b. Deletion of the following provision of the existing rule -

"However, in no case shall a faculty member be paid overload teaching/summer honoraria beyond a combined total of 18 teaching units of overload and summer teaching over one schoolyear (12

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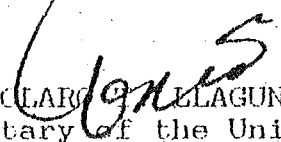
Excerpt from the Minutes of the 1091st Meeting of the Board of Regents held on 24 October 1995 as approved at the 1092nd meeting on 29 November 1995.

- 2 -

months). In reckoning absolute limit, all credit loads (teaching, research, administration, etc.), including summer teaching, in all units and programs of the U.P. System shall be counted."

Board action: Approval, effective First Semester 1995-1996. The revised rules shall apply to both graduate and undergraduate courses.

CERTIFIED CORRECT:


CLARO M. LAGUNO
Secretary of the University *oh*
and of the Board of Regents *pr*

4 December 1995

cc: The Vice-President for Academic Affairs _____
The Vice-President for Finance and Administration _____
The Vice-President for Planning and Development _____
The Vice-President for Public Affairs _____
The Chancellor, U.P. Diliman _____
The Chancellor, U.P. Manila _____
The Chancellor, U.P. Los Baños _____
The Chancellor, U.P. Visayas _____
The Chancellor, U.P. Open University _____
The Dean, U.P. in Mindanao _____
(Autonomous universities should furnish their
units/personnel concerned a copy of the
foregoing excerpt).
The Director, HRDO, U.P. Diliman _____
The Chief Accountant, U.P. System _____
The University General Counsel _____
The University Auditor _____

/sc

FINAL DRAFT

PROPOSED REVISION OF THE RULE ON MAXIMUM OVERLOAD AND SUMMER TEACHING HONORARIA

This is to recommend the amendment by the Board of Regents of the existing rule on maximum overload and summer teaching honoraria.

The present rule, approved by the Board on its 1040th meeting on March 26, 1992. (please see attached excerpts of minutes) sets a limit on overload and summer teaching which will be compensated with honoraria, "to protect faculty members from being assigned too much teaching and to prevent teachers from voluntarily taking in too much teaching, to the detriment of teaching efficiency and effectiveness."

Following this rule, only a maximum of nine (9) teaching units of overload honoraria will be paid per semester/trimester, or a maximum of six (6) units per term; and for the summer session, a maximum of two courses or nine(9) teaching units.

Teaching units (as distinguished from course credit which is based on the number of contact class hours per week, such that a 3 hour/week lecture class has three units of course credit) refer to the course credit multiplied by a multiplier that is determined by class size, course category (G.E. or non-G.E.) and course level (undergraduate or graduate). At present payment of overload honoraria is based on teaching units, rather than course credits.

As an example, Natural Science I, a G.E. course with 3 contact hours per week, has a course credit of three (3) units. The teaching units (TU) for this class is determined by the formula

$$TU = CU \times \left[\frac{1 + N - 40}{120} \right] \times 1.33$$

Course credits	Multiplier for classes larger than 40	Multiplier for a G.E. course
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Hence, if the class size is 100, then the teaching units will be

$$TU = (3)(1.5)(1.33) = 5.985 \text{ units}$$

The increased enrolment in U.P. Diliman and the inability of certain departments to hire faculty members have made it necessary for many faculty members to assume teaching overloads beyond the maximum nine (9) teaching units. The rule however, is a disincentive to faculty members who are willing to carry on the additional teaching load. When teaching load multipliers are applied,

particularly for large G.E. courses, the overload teaching units is likely to go beyond the maximum of nine (9) set by the present rule.

Thus, a teacher already on full load, who agrees to teach 2 additional sections of Natural Science I (six (6) course credits) with 100 students each, will earn 11.97 overload teaching units (2 x 5.985). However, following the rule, 2.97 units will not be compensated because these are beyond the maximum overload of nine (9) units. Contrary to the idea behind the use of overload multiplier, the teacher is unduly penalized despite the fact that there is no corresponding increase in the number of contact hours, which, according to the present rule, may be deemed detrimental to teaching efficiency and effectiveness.

To fairly compensate faculty members while at the same time safeguarding the original intent of the existing rule, the following amendments to the rules are proposed:

1) FROM : No faculty member shall be paid overload honoraria for more than nine (9) teaching units of overload per semester/trimester or more than six (6) units per term.

TO : No faculty member shall be paid overload honoraria for more than nine (9) ~~(teaching units)~~ **COURSE CREDITS** of overload per semester/trimester ~~or more than six course credits per term~~, **PROVIDED THAT THE OVERLOAD PAYMENT IS BASED ON TEACHING UNITS AND NOT ON COURSE CREDIT.** (Note: Words in brackets are to be deleted; words in bold letters are to be added.)

2) FROM : For the summer session, no faculty member shall be paid summer teaching honoraria for any load beyond two courses or nine (9) teaching units.

TO : For the summer session, no faculty member shall be paid summer teaching honoraria for any load beyond two courses or ~~(nine (9) teaching units)~~ **6 COURSE CREDITS**, **PROVIDED THAT THE OVERLOAD PAYMENT IS BASED ON TEACHING UNITS AND NOT ON COURSE CREDIT.** (Words in brackets to be deleted; words in bold letters to be added.)

3) The deletion of Provision No. 3.4 c, i.e.,

"However, in no case shall a faculty member be paid overload teaching/summer honoraria beyond a combined total of 18 teaching units of overload and summer teaching over one school year (12 months). In reckoning absolute limit, all credit loads (teaching, research, administration, etc.), including

summer teaching, in all units and programs of the U.P. System shall be counted."

A faculty member who handles, in one schoolyear, an actual teaching load of 30 teaching units (12 units per semester and, say 6 units in the summer) is deemed to have a full load. Such a faculty member cannot be expected to perform at optimal level if he is also saddled with too much overload. More than 18 units of overload and summer teaching in one schoolyear is considered excessive -- unhealthy and/or unfair for the teacher and the students.

Such that the limit on overload teaching shall be set at nine (9) course credits per semester and six (6) course credits per summer.

It is hoped that the above request will merit your consideration and indorsement to the Board of Regents.

Action of the Board of the Regents
at its 10.21.94 Meeting on 10.24.94
APPROVAL
[Signature]
CLAR T. LLAGUNO
Secretary of the University
and of the Board of Regents