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MEMORANDUM NO. OVCAA-ECA 20-517

TO : DEANS, DIRECTORS, COLLEGE SECRETARIES AND
HEADS OF ACADEMIC UNITS

FROM : EVANGELINE C. AMOR, Ph.D. 
Vice-Chancellor for Academic Affairs

SUBJECT : Teaching Load Credit, Overload Credit and Small Classes

DATE : 14 January 2020

This is to remind all faculty members to comply with the following:

1. Provisions in the Faculty Manual regarding the minimum required 12-unit semestral and 24-unit annual load of faculty member, compliance with which should be reflected by the actual load given to the faculty members attested to by him/her and the Unit Chairs, Deans or Directors in the Faculty Service Record (FSR). **Please note that all faculty members including part-time and lecturers are required to submit their FSR (hard copy) on or before 7 February 2020.**
2. Provisions on OP Memo no. 92-40, 21 July 1992 that present all the rules and guidelines for Overload Teaching honoraria.
3. Applications for Chancellor's approval to continue the offering of small classes in relation to overload credit computation. It is underscored that small classes should have been created and continue to be conducted only with the Special Approval of the Chancellor on or before the last day of registration (8 January 2020). However, these requests can be processed by the OAT up to **22 January 2020**, which is the office's deadline.
4. For those who have not yet submitted FSR Full Database and Overload Slips for Academic Year 2018-2019 and 1st Semester 2019-2020, please submit these **as soon as possible** and for those Units who have submitted their overload slips, they may now claim these from OAT-OVCAA (Rm 101 DILC Building). Please look for Ms. Tina.

Attached are the consolidated provisions from the Faculty Manual and the OP Memo.

Please be guided accordingly. Thank you.

CONSOLIDATED PROVISIONS ON MINIMUM TEACHING LOAD, OVERLOAD CREDIT AND SMALL CLASSES

1. TEACHING LOAD CREDIT

The *Faculty Manual* provides that:

"4.0 ...faculty members are expected to perform their duties prescribed by University rules and regulations." Under this appear sections on teaching load, thereby indicating that among the duties that a faculty member is expected to comply with is the required teaching load, to cite further:

"4.2 Teaching Load

4.2.1 Required Teaching Load [Chap 18 Sec 11, University Code; as amended at these BOR meetings: 861st, May 29 1975; 1020th, Apr 25 1988; 1023rd, July 27, 1989; and 1092nd, Nov 29 1995]

A normal teaching load of 12 units per semester or its equivalent in colleges and units observing the trimester or other systems shall be required of each faculty member

1) Teaching load credit.

...The regular teaching load of 12 units is reckoned using course credit. For example, a faculty member has to teach four (4) courses with 3-unit course credit each to satisfy the required 12-unit regular teaching load or three (3) courses, each with 4-units of course credit... (p 38)

2. OVERLOAD CREDIT

With reference to overload teaching, we also reiterate the provisions of OP Memo no 92-40, 21 July 1992 that presents all the rules and guidelines for Overload Teaching Honoraria and likewise refer to the Approval of the BOR at the 839th meeting Nov 29 1973, also articulated in the Manual (p p 37-47) that:

Sec 3 Overload Teaching. Teaching in excess of the normal load of 12 units shall be entitled to an honorarium subject to existing rules and policies; Provided that at least the minimum teaching load required under Section 1 shall have been complied with.

The Manual further cites provisions on how 12 units can be accounted for, other than through teaching activities (4.3, pp 41-43). In the same spirit, the Manual also explicitly refers to the appreciation of overload in the context of having units beyond "the normal load of 24 units per academic year" (*Faculty Manual*, 4.4. Overload, p 47; Administrative Circulars Memorandum 92-40, UP Gazette, pp 55,57). This is supported by the *UP Gazette's* pronouncement that:

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 school year (12 months, starting with the first semester), [UP Gazette Jul-Dec 1992, p 57]

9. Payments for Overload Teaching Honoraria at the end of the First Semester – As a rule, every regular fulltime faculty member must account for 24 units of credit load per school year (12 months). Theoretically, the credit load of a faculty member cannot be computed and payment for overload cannot be made until the end of the second semester.

3. SMALL CLASSES

Our current implementation of overload pay for regular class sizes versus the offering and pay for small classes in turn depends on the *Faculty Manual* (sec 4.2.2, p 37) and also citing the *UP Gazette's* text (Jul-Dec 1992, p 55):

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...

4. General Rules on Class Sizes and Credit Load – 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 10 students and for a graduate class, at least 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.

Administrative Circulars

MEMORANDA

Memorandum No. 92-40: Compilation of All Rules and Guidelines for Overload Teaching Honoraria

The Board of Regents in its 1048th meeting on 26 March 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 intention 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:

1. 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, administrative, 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, 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
Assistant Professor	20
Associate Professor	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., 8 a.m.-12 noon and 1-5 p.m., 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 spent 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 that $(10/12) \times (2/3)$ 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 honorarium Rate Per Unit:

for Instructors	:	55.5% of grade 16 annual salary divided by 24.
for Assistant Professors:	:	55.5% of grade 20 annual salary divided by 24.
for Associate Professors:	:	55.5% of grade 24 annual salary divided by 24.
for Professors	:	55.5% of grade 28 annual salary divided by 24.

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

2.4 Off-hours rate = P1.20 of regular rate (rounded off 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.

4. **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, 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, 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, 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 (who have) 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 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, he/she should continue to teach four subjects. If at least one of his/her four courses is a GE subject, 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), he/she shall be entitled to a credit load multiplier determined as follows:*

$$\text{CREDIT LOAD MULTIPLIER} = \text{MIN} [2, 1 + (N - 40)/120]$$

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 x 1.83 or 5.49 teaching units. If the 3-unit class is also a GE course, the teacher earns the credit 3 x 1.33 x 1.83 = 7.33 teaching units.

The maximum multiplier is 2.00 and it is attained when a class size reaches 160. It is deemed to be 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 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 ALC 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 UP

System Fiscal Policies and Operations Committee (FPOC). The grant of ALC is also subject to other rules.

7.2 Overload teaching by faculty administrators — The administrative load credit (ALC) 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 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 received 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 (UP or outside UP) for such research, 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 that they can have more time to study and finish their degree programs in the shortest time possible. The SLC are not meant as additional compensation. As a general rule, faculty members with SLC should not be assigned any overload teaching. If a student faculty member is being considered for overload honorarium, the SLC 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.

8. Maximum Overload and Summer Teaching that 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 school year.

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 undergraduate courses totalling 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 UP 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.

9. **Payments for Overload Teaching Honoraria at the End of the First Semester** — As a rule, every regular full-time faculty member must account for 24 units of credit load per schoolyear (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 much underloaded in the second semester.

10. **The Submission of All Grades As Prerequisite To Payment** — It is understood that no faculty member shall be paid overload or summer teaching honoraria until the faculty member shall have submitted all grades.

11. **Responsibility of Department Chairmen and Deans** —
a. It is understood that *before* a department chairman 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 needs 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. **College or Department with Excessive Overload/Lecturers/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 UP Administrative Order 24* (26 June 1992).

13. **Additional Rules** — Nothing in this memorandum removes the right of the Chancellor, the President, 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 teaching loads are determined judiciously taking into consideration the reasonable needs of students, the department, college, or the curricular program and not the mere convenience of individual faculty members.

14. **Dates of Effectivity** — The GE multiplier and the new rules for large classes shall be effective 1 June 1992. All the others are effective as of 1 November 1991.

21 July 1992

(Sgd.) JOSE V. ABUEVA
President

NEW RATES FOR OVERLOAD AND SUMMER TEACHING HONORARIA**
Effective 1 November 1991

Regular Rate Per Unit	
Faculty Rank	Approved Rates
Instructors	P1,330
Assistant Professors	1,890
Associate Professors	2,810
Professors	4,210
Off-Hours Rate Per Unit	
Instructors	P1,590
Assistant Professors	2,270
Associate Professors	3,370
Professors	5,052

Note: Off-Hours Rate = 1.20 x Regular Rate
Off-Hours means outside 8-12, 1-5 p.m. on Weekdays.

Memorandum No. 92-43: Administrative Infrastructure for STFAP

This is a friendly reminder for Chancellors to make sure that there is administrative support for STFAP in their universities.

This year 16,500 students submitted STFAP applications. The number of Brackets 1-4 students ("stipend receivers") increased dramatically from about 4,900 to 6,900. The number of Brackets 5/5a students, also increased from 4,800 to 5,500. These are the effects of the major rebracketing.

This year the pressure to falsify, misdeclare or withhold information is much greater because the STFAP allowances have increased (as much as P18,500 in tax-free cash per year when everything is included!). The tuition fees (as much as P5,400 per semester for tuition alone in Diliman) have also increased.

In the face of all these, we hope each constituent university has enough STFAP personnel (office staff and/or home visit teams) provided with the appropriate equipment (at least office equipment if not vehicles). The other administrative infrastructure:

1. **STFAP Payroll Capability for Regional Units** — Regional units (Baguio, Cebu, Tacloban, and SHS in Paio) are

*See p. 37.

**Approved by the UP Diliman University Council 3 August 1991