

## **Final Report of Task Force on the Implementation of State-supported Summer Session** (May 1, 2002)

As part of the Partnership Agreement with the State, UC is committed to achieving 40% of the average FWS quarter student workload FTE in the summer. In order to accomplish this, the State has now provided full summer workload funding for UCB, UCLA, and UCSB, and is currently considering funding for UCD. It is anticipated that UCSD will receive full workload funding for summer session students in the next year or two. Such workload funding will permit the campus the opportunity to treat summer instruction as it currently does FWS instruction, with appropriate incremental funding for instructional and institutional support. This would provide for staff support, operational support, student financial aid, and incremental funding for faculty FTE.

When such funding becomes available, summer instruction will be brought into Academic Affairs and be made a regular part of curriculum planning in the departments, programs, and colleges. The Senior Vice Chancellor-Academic Affairs (SVCAA) specifically asked this committee to identify significant issues and provide advice regarding the integration of summer and academic year faculty teaching and departmental curricula, subject to compliance with legislative directives. Our report has identified issues that will need to be considered by other Senate/Administrative work groups, and by the departments and undergraduate colleges.

In our discussions we assumed that workload funding to deal with institutional and instructional support would be available, and we focused on the cultural and structural issues which will need to be addressed. We have benefited from reviewing the plans and experiences at the campuses which have received summer funding. While we should continue to learn from them, it will be important to avoid permitting them to affect the establishment of UC-wide policies that we may not wish to implement at USCD. Each campus will have different priorities, and flexibility in the implementation of the summer directive will be essential. While we will not discuss them here, we have attached as appendices a few reports which we found useful. We identify and comment on the implementation issues approximately in order of their significance.

### **1. Ladder Rank Faculty Involvement.**

The most significant issue is whether faculty summer instruction will continue to be treated as “above-load”, with salary compensation in addition to the nine-month base salary, or “onload” as a normal component of the nine-month base salary commitment. Since the intent is to move to year

around instruction with summer fully integrated with FWS, and with uniform quality of instruction, ladder rank faculty should be involved in summer session in the same proportions as they are in FWS. This will not happen if faculty participation in summer instruction is continued as voluntary “aboveload”, independent of their FWS departmental commitments. While a few members of our committee felt that a mixed structure of “aboveload” and “onload” would maximize flexibility and should receive further consideration as a permanent model, the majority felt that at steady state, summer instruction should be “onload” with faculty teaching assignments spread over four terms rather than three. For many reasons, many faculty will find it desirable to be able to teach in summer session in lieu of teaching in one of the other terms. To achieve the 40% target, summer instruction would on average represent about  $0.4/3.4 = 0.12$ , or 12%, of the teaching load. Incremental ladder rank faculty FTE would need to be allocated to departments to meet this increased load. Although departments should have flexibility to work out teaching schedules, it must be clear that faculty are only paid their base salary for nine months and they should not be asked to work more than nine months.

If all faculty were required to share equally in the summer session, then on average each would need to teach one summer course out of every 8.5 courses, or once every two to three years. Therefore, another issue will be to decide if all faculty will be obligated to teach in summer. We would advise against this. This structural change must be seen as added flexibility to faculty to better schedule their teaching and research. There cannot be any perception that UCSD’s teaching schedule will hinder our faculty’s research and graduate education missions. We feel that the option will be seen as beneficial to enough faculty to accommodate the summer teaching requirements of most departments, assuming sufficient FTE are available to meet the required year round workload. The departments and their faculty should be surveyed to confirm such a conjecture, and we should also survey other major institutions to see if they are also headed in this direction.

There will need to be a transition from the current “aboveload” summer instruction model to the “onload” structure. The length and nature of transition needs to be investigated. For example, a combination might suffice in which some faculty teach “aboveload” for extra compensation and others “onload” in lieu of some FWS instruction or other departmental commitments. Such a mixed system might be a bit chaotic, and the salary compensation to faculty and to departments for this interim structure would be more complicated and require additional attention. While we can likely learn from the other campuses, we suggest that the transition should be as short as possible, perhaps two years.

## **2. Allocation of Incremental Faculty FTE to Enhance Summer Instruction**

In order to have the new FTE impact summer instruction, there will be motivation, at least implicitly, to tie the allocation of the incremental FTE to commitments by departments to teach undergraduate courses in the summer. However, the need and capability to teach in the summer may vary substantially by discipline and department, depending on the need for service courses, laboratory courses, upper division elective courses for the major, size of faculty, etc. Our current allocation of faculty positions is based on many factors, only one of which is undergraduate instructional workload. We are aware that at least one of the other three campuses with the summer workload funding is placing “strings” on the allocation of the incremental FTE which tie them to summer teaching commitments. We do not believe this should be necessary, that our methodology for FTE allocation should not change, and that graduate instruction and other programmatic and quality factors must continue to be evaluated in the allocation of all FTE. Further, given the desire to manage enrollments and maintain a balance of disciplines on the campus, we should not permit FTE allocations to be driven solely by enrollments. However, departments will need some type of assurance that additional teaching in the summer will result in some flow of resources to accommodate the growth. We feel the distribution of summer generated FTE will be a significant issue for the SVCAA to consider and should be discussed frankly with departments, deans, and the Senate.

## **3. Scheduling of Summer Instruction**

Summer session has traditionally offered compressed courses, meeting more hours per week for fewer weeks. Academic Senate (CEP) policy mandates that summer session course material and requirements should not be compromised compared to the FWS version of the course. At UCSD, summer session is primarily offered in two five-week sessions, although many flexible variations have been employed in response to particular requests of departments and/or faculty. The previous summer session task force identified scheduling as one of the major concerns of departments. Several chairs felt that many courses could not be compressed into five weeks, while others felt that certain courses, such as laboratory courses, could be compressed into less than five weeks. Informal discussions with the registrar’s office confirms that to properly integrate the administration of summer instruction into FWS may require that the summer term be less flexible than it is currently, and most likely there will need to be only one term of a specific duration, likely longer than five weeks. The duration of the summer term need not be a full quarter of ten weeks, although some of us believe that this may ultimately come to pass and that we should consider this scenario in our planning. We recommend that a separate group

begin to work with the departments and the registrar to understand the implications of summer term scheduling and to define scheduling options that will optimize the participation of the departments, given their curricula, the faculty scheduling needs, facilities maintenance requirements, housing availability, and the other summer activities in which our faculty are involved, including outreach. We caution that compression of the summer term and flexibility are both seen as incentives for faculty involvement in summer instruction. For example, if the “onload” structure is adopted, then some faculty would surely prefer to teach a compressed course in the summer in lieu of a ten-week course in FWS.

#### **4. Departmental Issues**

Many faculty issues will naturally occur within departments, such as committee service, undergraduate and graduate advising responsibilities, and contract and grant obligations. In nearly every case, the issues already occur to some extent because of the existing flexibility of faculty teaching schedules and various types of leave. A great deal of department and campus committee service is already occurring in the summer. In response to an informal query, the Office of Contracts and Grants Administration (OCGA) sees no problems with summer instruction since most agencies are not concerned about which months are charged to the contract. However, the question should be formally presented to OCGA to ensure adequate consideration of agency-specific requirements. We did not consider in any detail the effect that a variable three-quarter service period might have on the academic review process.

By and large, we do not think that any of these departmental issues will represent a major impediment to faculty teaching “onload” in the summer. Similarly we do not foresee major challenges to the operation of the Academic Senate during the summer, although some modest adjustment of activities will need to occur with additional funding. However, substantial curricular planning efforts will need to be undertaken by the departments. This planning would benefit from some special one-time funding to permit this to occur expeditiously by departmental faculty, perhaps over the summers, and we would advise the SVCAA to consider this.

While there will certainly need to be discussions with chairs about departmental issues and some guidelines will need to come from the SVCAA, the specifics will vary considerably by discipline. Consequently, we urge that whenever possible, decision making should be decentralized to departments subject to compliance with general policy guidance. The key to a smooth transition will be sufficient incremental funding for departmental staff and operations. As we noted above, we are not

commenting on the infrastructure needs because we assume that the appropriate budget augmentations can be made when we receive full workload funding from the State.

The extent of involvement in summer instruction will naturally vary by department. Depending on their curricula and type of instruction some departments may not be able to expand course offerings in the summer very much. Further, the nature of the research of some faculty may preclude them from being available to teach in the summer. While the new structure should permit departmental participation to evolve naturally, it may be necessary to provide some incremental incentives to encourage active participation by departments, especially in the early stages of the transition. Since departments already receive full workload credit for summer session teaching, the primary additional incentive would be special funding for departmental programs to benefit instruction and/or faculty, including compensation for any interim overload. Again, we may learn from what has worked at the other campuses.

## **5. Student Issues**

We did not discuss student issues, and SVCAA will likely want to convene another group to consider the impact on students, admissions, and degree progress. There were specific suggestions made in the previous summer session task force which could be considered if the summer instructional structure does change. The initial results from the other campuses have shown that the major incentives for student participation in summer have been the availability of financial aid, reduced fees, and additional courses. All of these should occur with the State workload funding. The results have been dramatic for the three campuses which have received the workload funding. Their summer student workload FTE grew by an average of 58% in just the first summer (2001). By comparison, at UCSD summer 2001 enrollments increased by about 20%, with no exceptional incentives.

A particular issue for UCSD will be how the colleges may be impacted by 40% enrollments in the summer term. If freshmen are to be involved in this growth, then there are issues with the sequencing of the core curricula, academic advising, residence halls, and college activities. The Colleges should be asked to develop options and identify associated resource issues.

## **6. Conclusion**

If we are to make the transition to year round instruction, there must be substantial discussion among the departments, the Academic Senate, the undergraduate colleges, and the Administration. It must be

viewed by the faculty at large as a positive opportunity to help UCSD meet the demands of unprecedented enrollment growth. There should be as much flexibility as possible given to the campus by the Office of the President and to the departments by the SVCAA to devise the best strategies for implementation . The transition must preserve what is important for faculty who will think it is not a change for the better and also accommodate those who view it as an attractive opportunity. We believe that with the proper funding and advanced publicity about the potential benefits and opportunities, the campus can respond positively.

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**Attachments:**

- Academic Council Chair Cowan letter re: compensation of faculty for summer term instruction (1/22/01)
- UCB letter to faculty re: opportunities for Summer 2001 faculty teaching (3/16/01)
- Council of Vice Chancellors Agenda Items for Discussion of Summer Session Issues (10/01)
- UCOP Assistant Vice President-Academic Advancement Switkes responses to questions from UCSC Academic Personnel Office
- UCSB Transitional Policy for Teaching/Service in Summer 2002 and Beyond (11/6/01)
- UCSD Summer Session Enrollment Statistics, 1992-2001 (11/28/01)
- UCOP Report on University of California State-Supported Summer Instruction (1/02)

Note: We are not attaching the report of the previous Summer Session Task Force submitted to the SVCAA on June 30, 2000, which is available on the Academic Affairs web site:

[http://academicaffairs.ucsd.edu/offices/planning/reports/SSTF\\_Rpt/SumrSessTFRpt.htm](http://academicaffairs.ucsd.edu/offices/planning/reports/SSTF_Rpt/SumrSessTFRpt.htm)