

2005-06 Instructional Load Summary

2005-06 INSTRUCTIONAL LOAD SUMMARY REPORT

Definitions and Explanations

Introduction

The *Instructional Load Summary* is a report published annually by the Office of Institutional Research and Policy Studies that summarizes the distribution of instructional workload across the campus during the previous five years. Several measures of instructional workload, which are defined in detail below, are indicated for each department. Divisional and campus totals are also presented.

Headcount Majors

Headcount Majors refers to the three quarter average number of declared majors in each department. Only students who have petitioned and been admitted to a major program are included in the counts. In order to arrive at an average for the year, the total numbers of majors as of the fifteenth day of instruction during fall, winter, and spring quarters are added together and divided by three. For purposes of this report *proposed* majors are included in the *undeclared* major count.

Departments that sponsor multiple majors are credited for all of them. Students with double majors are counted as 0.5 and triple majors as 0.33 in each. Combined majors are attributed to their primary sponsoring department major count. Thus, when the number of undeclared majors is added to all other majors, total headcount majors are equal to the three quarter average campus enrollment for the year. Numbers are reported by student level as follows:

Lower Division:	Freshmen and sophomores (less than 90 earned units)
Upper Division:	Juniors and seniors (90 or more earned units)
Certificate:	Post-baccalaureate certificate students
Graduate-1st Stage:	Graduate students in doctoral programs who are not yet advanced to candidacy, and students in terminal masters graduate programs
Graduate-2nd Stage:	Doctoral students advanced to candidacy

Student Workload FTE

Student workload FTE (full-time equivalency) is an approximation of the number of full-time students taught by each department over the course of the academic year. Because expectations for what constitutes full-time status differ for undergraduate and graduate students, workload FTE is calculated differently depending on student level.

Undergraduate student workload FTE is defined as total *student credit hours* divided by 45 units.

Student credit hours are equal to the number of undergraduate students enrolled in undergraduate courses as of the fifteenth day of instruction multiplied by the course's unit value. Graduate students enrolled in undergraduate courses are not included in undergraduate student credit hours.

Forty-five units is the number considered a full-time course load for an undergraduate during the course of an academic year, which assumes a 3 five-unit course load during the fall, winter and spring quarters.

In this report undergraduate workload is broken into lower and upper division, depending on the level assigned to the *course* (as opposed to level of the students enrolled). A department's undergraduate student workload FTE is based on all courses taught by any faculty hired by the department. This includes credit for the workload associated with courses taught by ladder faculty outside of their home department.

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Graduate student and certificate student workload FTE is determined by the level of the student enrolling in the course, rather than by the level of the course itself. For example, a graduate student who enrolls in an undergraduate course contributes to graduate student FTE and not undergraduate FTE.

Certificate workload FTE is defined as the total number of courses certificate students are enrolled in multiplied by the unit value of each course and then divided by 45 units to yield FTE.

Workload credit for first-stage graduate students (masters students and doctoral students not advanced to candidacy) is defined as the total number of course enrollments for first stage graduate students multiplied by the unit value of each course and then divided by 36 (the number of units considered full-time status for graduate students).

As with undergraduate workload, first stage graduate and certificate workload is assigned to the home department of ladder faculty members or to the department sponsoring the course, if taught by temporary faculty.

Second stage graduate student workload FTE is equal to the three quarter average headcount of doctoral students who are advanced to candidacy but have not exceeded nine quarters of enrollment since advancement. The three quarter average is equal to the number of second stage graduate students enrolled as of the fifteenth day of instruction during each quarter divided by three.

Student Workload FTE:

Lower Division:	Number of students enrolled in courses (#1-99) multiplied by the unit value of each course (usually 5 units), divided by 45. All certificate and graduate enrollments are excluded as of 1991-92.
Upper Division:	Number of students enrolled in courses (#100-199) multiplied by the unit value of each course (usually 5 units), divided by 45. All certificate and graduate enrollments are excluded.
Certificate:	Number of certificate students enrollments in all classes multiplied by the unit value of each course (usually 5 units), divided by 45.
Graduate-1st Stage:	Number of graduate student (excluding those advanced to candidacy) enrollments in all classes multiplied by the unit value of each course (usually 5 units), divided by 36.
Graduate-2nd Stage:	The three quarter average headcount of graduate students advanced to candidacy minus students who have exceeded nine quarters after advancement to candidacy.
Total FTE:	The sum of lower division, upper division, certificate, Grad 1st Stage and Grad 2nd stage workload as defined above.

Budgeted Faculty FTE

The total budgeted faculty FTE represents the number of faculty FTE allocated to the campus by the University of California Office of the President (UCOP). In this report, total budgeted faculty FTE is partitioned into two components--permanent and temporary.

Permanent budgeted faculty FTE represents the number of positions filled by ladder faculty and security of employment lecturers. Open provisions are not included in permanent budgeted FTE. Leaves and sabbaticals are not subtracted from this total.

Temporary budgeted faculty FTE represents the sum of centrally allocated Temporary Academic Staffing funds, open provisions, and course relief funding, divided by the current salary level of an Assistant Professor III (\$51,400 in 2000-01). For the Engineering FTE calculation, the engineering

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salary scale is used (Assistant Professor II @ \$61,400). Temporary FTE are distributed to each program or department based on the percentage of the total divisional temporary faculty hired, as reported by each division. The actual allocation made to a program or department may differ, particularly when savings from faculty leaves and sabbaticals are available.

When the derived temporary faculty FTE is added to the permanent faculty FTE, the total often exceeds the campus' budgeted allocation. Since the total must equal UCSC's budgeted FTE allocation, a constraining factor has been applied. It is equal to the total campus budgeted faculty divided by the sum of the permanent and the derived temporary faculty FTE. The sum of the permanent and the derived temporary budgeted FTE for each program or department is then multiplied by the constraining factor. For each department, temporary faculty FTE is expressed as the difference between the constrained total and the permanent faculty FTE. Departments with minimal temporary faculty may have a negative value for temporary budgeted FTE. The negative numbers are artifacts of the methodology, but they do help to illuminate the resource distribution of temporary dollars.

Payroll Faculty FTE

Payroll faculty FTE represents the number of permanent and temporary faculty who are available to teach classes. This statistic is extracted from campus payroll data and is adjusted for sabbaticals, leaves, administrative responsibilities, and course relief granted by the Campus Provost/Executive Vice Chancellor's Office (CP/EVC).

Teaching Assistants

The numbers of actual TAs hired was supplied by the Divisions and is based on the numbers of teaching assistants hired by each of the departments. The divisional and campus total pages of this report indicate both the Campus Provost/Executive Vice Chancellor's allocations for TAs as well as the numbers of TAs actually hired.

Workload Ratios

The official *budgeted* student to faculty ratio is calculated as the total student workload FTE to total *budgeted* faculty FTE. It is consistent with the ratio used by the State as the basis for appropriating workload funds to the campuses systemwide. Through 1996-97, UCOP allocated funds based on a *weighted* student FTE (where students were weighted based on their level, with graduate students weighted the highest) to budgeted faculty FTE. In 1997-98, the *weighted* student: faculty ratio was replaced with an *unweighted* student: faculty ratio as the basis for the distribution of faculty FTE to the campuses.

Total student workload FTE to total *payroll faculty* FTE measures the number of students per actual teaching faculty (available over a given year) (per definitions above). A five-year history of this ratio is reported in the appendix.

The undergraduate FTE to TA ratio is constrained to UCOP allocations. Actual TA usage is greater than indicated because of augmentations funded both by CP/EVC and from divisional resources.

The ratio of permanent payroll faculty FTE to permanent budgeted faculty FTE is also reported. It gauges the number of permanent faculty available to teach compared to the number of budgeted faculty (positions).

Degrees Conferred

Degrees conferred each academic year are the total number of degrees awarded during consecutive summer, fall, winter, spring quarters. Previously the Instructional Load Summary has reported degrees on a Degree Year basis (fall, winter, spring, summer), however the data in this report now reflect Academic Year degrees for the past five years. Consistent with equivalent headcount major reporting, students with double degrees are credited as 0.5 of a degree to each department, and students with triple majors as 0.33 of a degree for each department.