**AAC Guidelines for Load Balancing**

May 18, 2017

**Article 32.02.C**

1. The District will maintain a record of each contract faculty member’s load balance in units of FTEF. The ending load balance for each semester will be the ending load balance for the previous semester plus the contract load of the current semester minus one FTEF (or less as specified by section 32.02 or other arrangement between the faculty member and District).
2. The semester load of each faculty member will be **greater than 73 percent and less than 127 percent**, except in the case of mutual agreement of the faculty member and the District. (\*notice there is no longer a time frame stated in the contract.)
3. By mutual agreement of a contract faculty member and the Senior Vice President of Academic Affairs (SVPAA), the faculty member’s contract load balance may be adjusted on a one-time basis by converting contract load to hourly load. The District will notify AFA of this adjustment in a timely manner.
4. The District may adjust a negative contract load balance of a contract faculty member up to zero by converting all or some of the faculty member’s hourly load to contract load. The District will notify the faculty member and AFA of this adjustment before the published schedule of classes (Article 16: Hourly Assignments, paragraph 16.02.A.4) for the semester in which the adjustment is made.

**Guidelines**

1. Load **balancing** is completely different than load **banking**. For load **banking**, see District/AFA Contract Article 32 and the “Load Banking Primer” published by AFA.
2. Every semester, before second proof, the Scheduling Office sends a Load Balance Report to the Deans for faculty members with a load balance of < or > than 10%. The dean (or assistant) should always review this document looking for positive or negative load balances, particularly checking for errors, and making any corrections at that time.
3. At any time, it can be determined if a faculty member is carrying a load balance, the dean/chair/faculty can pull an historical load summary and review the load history. When the dean discovers a positive or negative load balance of greater that 27%, the dean should alert the chair that load balancing may be needed.
4. Whenever possible, the chair should give the faculty member some choice about load balancing – perhaps the faculty member wants to use a positive load balance in a particular semester or perhaps there is a semester in which it is easier for them to carry an extra class.
5. If the individual retires with a **negative** load balance, it is difficult to make up that difference, and the District may simply absorb that negative load. Pay particular attention to the load balances of faculty members nearing retirement.
6. In special situations, with the approval of the Supervising Administrator and the Senior VPAA, an individual could be given a small special assignment of some sort to balance out a negative load, such as providing additional outreach, curriculum, or other work in excess of normal expectations.
7. **How to Load Balance – Positive Balance**

John Smith usually teaches five classes of 20% each, for 100% load. He also has an established load of 20% for hourly assignments. John has carried a 20% positive load balance for several semesters now. John wants to continue to carry his overload.

So, his load balance could look like this:

Spring 2017 80% scheduled contract load

Load balance (20% no class – allow positive load bank to cover it)

Overload 20% (existing established load per the Contract)

**Total load 120%**

1. **Positive Balance – not eligible for overload**

If John Smith had a lower seniority in his department and did not have an established load, he might not be eligible for an overload. The dean/chair must first assure that John meets all of the usual rules in Article 16. If not eligible for an overload, his load would be 80%, using the positive load balance to total 100%.

1. **How to load balance – Negative Balance**

Sally Jones teaches in the Art department, where the usual load for a Studio Art class is 32.2637%, typically teaching three classes for a 96.7911% assignment per semester. Over the past seven semesters, she has accumulated a minus 22.4623% load balance. Sally must now teach one extra class to balance her load.

**Teaching load**

Fall 2016 -22.4623% negative load balance

Spring 2017 129.0548% (four sections of Studio Art)

Spring 2017 balance = +6.5925%

1. **The “No Splitting “ Rule**

A Formal Interpretation between AFA and the District states (May 8, 2013) states, “The District and AFA agree than any contract load in a given semester will be applied to the faculty member’s load balance. Contract faculty members do not have the option to convert contract load.”

So, for example if a faculty member’s load is 105% every semester, s/he cannot be paid for that extra 5%. It is part of his/her Contract Load. The extra load must accumulate until there is a way to load balance. (Note: the reason for this, is that load balancing may create an opportunity for an adjunct faculty member to teach a class, and for this reason, contract faculty cannot simply choose to be paid instead of load balancing.)