

Definitions and Explanations

Introduction

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

INSTRUCTORS

Budgeted Faculty FTE

The *total budgeted faculty FTE* (full-time equivalency) is the number of faculty provisions allocated to the campus by the University of California Office of the President (UCOP), and represents an accounting, or control total for the campus. The *budgeted faculty FTE* include those provisions that are allocated to the academic divisions and schools, as well as those held centrally as reserves. *Budgeted faculty FTE* is partitioned into two components—permanent and temporary.

- *Permanent budgeted faculty FTE* is the number of positions filled by ladder faculty and security of employment (SOE) lecturers. Open provisions and provisions held by academic administrators are not included. Leaves and sabbaticals are not subtracted.
- *Temporary budgeted faculty FTE* represents the open provisions that are allocated to the divisions, school, and central campus reserves. The total temporary budgeted FTE that is available in each division and school is prorated to the departments based on the distribution of actual temporary payroll FTE within the division/school.

Payroll Faculty FTE

Payroll faculty FTE represents the full-time equivalent number of instructors who are available to teach classes, and is also partitioned into permanent and temporary faculty. Payroll faculty FTE is extracted from campus payroll data.

- *Permanent payroll faculty FTE* represent the full-time equivalency of ladder and SOE instructors as adjusted for sabbaticals, leaves, administrative responsibilities, and course relief granted by the Campus Provost/Executive Vice Chancellor's Office (CP/EVC).
- *Temporary payroll faculty FTE* represent the full-time equivalency of non-ladder/non-SOE instructors based on their appointment percentages (including unit 18, graduate student instructors, visitors, emeriti, etc.).

INSTRUCTIONAL WORKLOAD

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 determined by the level of the course and the level of enrolled students, and is defined as total *student credit hours* divided by 45 units.

- *Undergraduate student credit hours* are equal to the number of *undergraduate student enrollments* in *undergraduate courses* as of the fifteenth day of instruction multiplied by the course's unit value.

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- 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.
- **Lower and Upper division workload FTE** is determined by the level assigned to the *course* (as opposed to level of the students enrolled).

Graduate student workload FTE is determined primarily by the level of the student enrolling in a graduate course. Undergraduate students enrolled in graduate classes are included in graduate student FTE on a designated line. However, graduate students enrolled in undergraduate courses contribute to graduate student FTE and not undergraduate student FTE.

- **Graduate-Undergraduates enrolled FTE** is defined as the total number of undergraduate enrollments in graduate courses multiplied by the unit value of each course and then divided by 45 units to yield FTE.
- **Graduate-Certificate 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.
- **First-stage graduate FTE** is defined as the total number of first stage graduate students student (masters students and doctoral students not advanced to candidacy) enrollments multiplied by the unit value of each course and then divided by 36 (the number of units considered full-time status for graduate students).
- **Second-stage graduate FTE** is equal to the number of second stage graduate students registered as of the fifteenth day of instruction during each fall, winter or spring quarter divided by three. Doctoral students advanced to candidacy for more than nine quarters are excluded from the graduate FTE totals.

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.

Graduate-UG Enrolled: Number of undergraduate student enrollments in graduate level courses multiplied by the unit value of each course (usually 5 units), divided by 45.

Graduate-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.

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Departmental Course Assignment of Student Workload FTE is determined by the course's primary instructor. For courses taught by ladder rank or SOE faculty, *Student Workload FTE* is attributed to the instructor's appointment department. For courses taught by non-ladder, non SOE instructors (including unit 18, graduate student instructors, visitors, emeriti, etc.), *Student Workload FTE* is credited to the department sponsoring the course subject code. *Student Workload FTE* based on Graduate-2nd Stage FTE is credited to the home department of the student's major.

Student Workload FTE for cross-listed courses is determined by the instructor type and the course students enrolled in. All enrollments in a cross listed course taught by a single ladder or SOE instructor are attributed to the instructor's home department. Enrollments in a cross listed course taught by a temporary instructor are split proportionally among the departments sponsoring the course subject codes.

Enrollments in courses co-taught by multiple ladder or SOE instructors are split evenly between the instructors' home departments if the instructors are appointed in different departments.

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 instructors on payroll (available over a given year).

Student workload FTE to both budgeted and payroll Faculty FTE are also presented at the divisional and departmental levels, as are undergraduate student FTE to budget and payroll TA FTE.

Headcount Majors

Headcount Majors refers to the three quarter average number of declared majors and pre-majors sponsored by 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. Majors 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)
Graduate-Certificate:	Post-baccalaureate academic certificate students
Graduate-1st Stage:	Graduate students in doctoral programs who are not yet advanced to candidacy; and students in terminal masters programs
Graduate-2nd Stage:	Doctoral students advanced to candidacy

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Degrees Conferred

Degrees conferred each academic year are the total number of degrees awarded during consecutive summer, fall, winter, spring quarters. 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. Degrees conferred during summer are counted as preceding the academic year degree total.