

Implementation of Lecturer SOE series policy changes

March 2019

Background

2014-15

- Associate Vice Provosts/Associate Vice Chancellor subcommittee: *Identified major areas needing policy revision*

2015-16

- LSOE Senate-Administration Workgroup: *Developed recommendations around the identified areas*
- Academic Personnel Workgroup: *Drafted revised APM language*

2016-18

- Management Review: *Draft APM language reviewed by Senate and campus Administrators*
- System-wide Review: *Broader review by University community*
- October 2018: new APM policies issued with extended implementation timeline

Major changes

Sabbatical:

Campus practice of “Educational Leave” becomes Sabbatical (with no loss of accrued credits)

Service as Unit 18 Lecturer does not count towards Lecturer PSOE service

Compensation model (ranks/steps) based on Professorial model

- Very similar to our long-standing campus practices

Revised criteria for evaluation:

Professional Achievement and Activity

becomes:

Professional and/or Scholarly Achievement and Activity

Working title: Teaching Professor

Changes already in place

- Educational Leave  Sabbatical
 - Use AP Folio as the official record of sabbatical balances
 - UCPath not yet transitioned from Educational (“in lieu of”) to “sabbatical” so may show errors. Reconciliation will be done at some point in the future

- Prior service as Lecturer for PSOE appointees
 - Outreach to impacted individuals already took place
 - Important to remember if current recruitments for PSOE

Compensation model

Current

- Ranks but no steps
- All on the same scale
- No acting titles

New

- Addition of steps (same as Professorial scale)
- Addition of B/E/E scale
- Acting codes for all levels and both scales

**TABLE 1L
FACULTY--LECTURER WITH SECURITY OF EMPLOYMENT SERIES
ACADEMIC YEAR**

<u>Rank</u>	<u>Step</u>	<u>Years at Step</u>	<u>Salary Scale 7/1/18</u>		<u>Salary Scale 1/1/19</u>	
			<u>Annual</u>	<u>Monthly</u>	<u>Annual</u>	<u>Monthly</u>
Lecturer PSOE	II	2			66,600	5,550.00
	III	2			70,200	5,850.00
	IV	2			74,200	6,183.33
	V	2			78,000	6,500.00
Lecturer SOE	I	2			78,100	6,508.33
	II	2			82,200	6,850.00
	III	2			86,400	7,200.00
	IV	3			91,600	7,633.33
Sr. Lecturer SOE	I	3			91,700	7,641.67
	II	3			98,800	8,233.33
	III	3			106,300	8,858.33
	IV	3			114,100	9,508.33
	V	3			122,500	10,208.33
	VI	3			132,100	11,008.33
	VII	3		142,500	11,875.00	
	VIII	3		154,100	12,841.67	
	IX	4		167,200	13,933.33	

Transition process

- Placement will be based on status as of July 1, 2019 following finalization of July 1, 2019 personnel actions.
- All appointees will remain at the same rank; Lecturer PSOE, Lecturer SOE, or Sr. Lecturer SOE
- Salaries will not change other than rounding to the 100s. In no case will a salary be decreased.
- Step will be based on past advancement history at rank. For example, an individual promoted to Lecturer SOE effective 7/1/18 will transition to Lecturer SOE step I.
- The next eligible date for review will remain unchanged.

Transition process

- Placement on the scale will be reviewed by Deans and CAP, with the Associate Vice Chancellor for Academic Personnel making the final decision. [March-April]
- Appointees and departments will be notified of their July 1, 2019 rank and step as soon as possible once the final decisions are made. [May-July]
- The scale placement decision may be appealed by the candidate and/or department chair via the Dean. Appeals must be submitted within 60 calendar days of notification of the placement decision. The Associate Vice Chancellor for Academic Personnel will make the final decision on the appeal.

New Criteria

Teaching

- Remains unchanged. Still the primary category of review
- APM: more detail of evidence of teaching options

University and public service

- Remains unchanged

Professional *and/or Scholarly* Achievement and Activity

- At a system-wide level more acknowledgement of scholarly work
- Has always been recognized at UCSB, although not required
- *And/or* not a requirement of both

Professional and/or Scholarly Activities

- Professional and/or scholarly activities may be related to the underlying discipline itself or to the pedagogy. Such activities should provide evidence of achievement, leadership, and/or influence on the campus or beyond. Certain administrative work (e.g., of learning centers and teaching programs) and community outreach work are also relevant, as would be presentations of seminars or lectures at other institutions or professional societies, or participation in scholarly activities (e.g., summer seminars) designed to enhance scholarly expertise in relevant fields. Other records of participation in intensive programs of study - in order to be a more effective teacher and scholar, with the goal of enhancing one's teaching and scholarly responsibilities - are also relevant evidence of professional and/or scholarly activity. Creative activities count as relevant professional and/or scholarly activities in appropriate disciplines. In certain fields, such as art, architecture, dance, music, literature, and drama, an accomplished creation should receive consideration as an example of professional and/or scholarly achievement and activity. In evaluating creative activities, an attempt should be made to define the candidate's merit in light of such criteria as originality, scope, richness, and depth of creative expression.

Evidence includes such items as:

- a. Documentation of the development of or contributions to:
 - i. Original materials designed to improve learning outcomes;
 - ii. Evidence-based design and evaluation of educational curricula or pedagogy;
 - iii. Administration and evaluation of a teaching program or a learning center;
 - iv. Systematic quality improvement programs and evaluation of their implementation;
 - v. Discipline-specific information systems;
 - vi. Development and evaluation of community outreach or community-oriented programs.
- b. First, senior, or collaborative authorship of scholarly or professional publication;
- c. Accomplished performance, including conducting and directing;
- d. Accomplished artistic or literary creation, including exhibits;
- e. Accepted invitations to present seminars or lectures at other institutions or before professional societies.

More about criteria and advancement

Everyone transitions to new scale 7/1 but transition to new criteria may be delayed.

- Addition of career reviews at Sr. SOE VI and Sr. SOE Above Scale
- Overlapping steps (PSOE V, SOE IV)

Draft Red Binder language:

- SOE series information incorporated into other sections

Transition to new criteria

- Cases currently under review for 7/1/19- no change
- In April 2019, all SOE series appointees will be asked to elect to be evaluated by the new criteria, or to remain under the old criteria and delay their decision by one year. Individuals being reviewed for advancement effective July 1, 2020 will be reviewed based on the criteria selected.
- In April 2020, April 2021, all SOE series appointees who have not yet transitioned to the new criteria will be asked to elect to be evaluated by the new criteria, or remain under the old criteria and delay their decision by one year.
- In April 2022, any SOE series appointees who remain under the old criteria will be transitioned to the new criteria, for reviews effective July 1, 2023. A campus process for exceptions to this deadline (permanent grandfathering) will be established prior to April 2022.
- The decision to move to the new criteria is irrevocable.
- Use of either the old or new criteria may not in and of itself be used as the basis for reconsideration of a final advancement decision.

Other matters

- Still use standard bio-bib format.
 - RB draft indicating either four areas or combine into three as an option. Awaiting input and comments
- Working title
 - Teaching Professor proposed in RB drafts
 - Official campus title still Lecturer SOE series titles
 - Can use for: signature of letters, on websites, in solicitation letters to external reviewers, etc.
- Workload
 - Heavier than Professorial series but less than Unit 18 Lecturers
 - No campus-wide standard; college/division/dept. variance ok
 - Discuss with Deans if issues

Wrap-up

- APM 285 and 210 available on UCOP web site or via Academic Personnel site link
- Review Red Binder draft updates. Available for review at
- <https://ap.ucsb.edu/policies.and.procedures/red.binder/drafts/>
- Review campus implementation guidelines on AP website under Resources for Department Analysts
 - Will be posted after SOE/Chair meeting
- Direct questions to Helly Kwee or Lia Cabello

Questions?