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Office of the Vice President for Academic Affairs

7 October 2022

DANILO L. CONCEPCION
 President
 University of the Philippines

Approved

 OCT 10 2022

Dear **President Concepcion**:

May I now formally endorse the following proposals for your approval:

- The PROPOSED PAYMENT SCHEMES FOR RENEGING FELLOWS based on previous BOR-approved policies; and the PROPOSED IMPLEMENTING GUIDELINES ON THE GRANT OF FELLOWSHIPS/SCHOLARSHIP PRIVILEGES AND THE SETTLEMENT OF CONTRACTUAL OBLIGATIONS
- The revised PROPOSED ADMINISTRATIVE LOAD CREDITS (ALC) OF UP DILIMAN for the adoption of other constituent universities (CUs).

The President's Advisory Council endorsed both proposals for your approval in its 385th PAC meeting on 19 April 2022. In the case of the ALC proposal, the PAC endorsed it with no comments. The Board of Regents also delegated the authority to approve ALCs to the President or Chancellors in its 1371st meeting on 9 June 2022.

In the case of the Proposed Payment Schemes for Reneging Fellows, the PAC raised several comments that the proponents responded to, as reflected in the table below:

PROPOSAL	COMMENT/SUGGESTION	ACTION/RESPONSE
Implementing Guidelines on the Grant of Fellowship/Scholarship Privileges and the Settlement of Contractual Obligations	<p>The PAC suggested that sections on the proposal related to Sabbatical can be taken out as a separate committee shall look into matters related to Sabbatical.</p> <p>The PAC also requested for further discussion regarding Special Detail.</p> <p>If the proposal is going to be implemented across CUs, all items referring only to UP Diliman must be changed (e.g., CU HRDO instead of UPD HRDO, CU Accounting Office instead of UPD Accounting Office, etc.)</p> <p>The committee discussed the implications of the Surety Contract Agreement, such as Performance Bonds. This can be included in scholarship contract as an option or requirement.</p>	<p>Sections on Sabbatical had been taken out from the proposal.</p> <p>The proposal includes a section on Special Detail. (Refer to pages 10-14.)</p> <p>The proposal has been updated to reflect this suggestion. (Refer to pages 21-36.)</p> <p>The HRDO included Performance Bonds as an option in the Surety Contract Agreement. The HRDO has also consulted with the GSIS regarding its mechanism.</p>
Payment Schemes for Reneging Fellows	<p>The AAC recommends revision or deletion of "return to the University as a Balik-PhD appointee" as one of the types of engagement under payment in kind. (See Table 2: Payment in Kind, page 11, item 14.)</p>	<p>However, this type of engagement is among the BOR-approved other forms of payment. This operationalizes BOR 1324th approval of option to allow UP renege fellows to pay back obligation through other forms of <u>payment</u>.</p>

Thank you for considering this endorsement.

Yours truly,

 Maria Cynthia Rose B. Bautista
 Vice-President for Academic Affairs

Administrative Load Credits (ALC) Committee

PROGRESS REPORT AS OF 23 DECEMBER 2021

BACKGROUND

Approved
[Signature]
OCT 10 2022

The Administrative Load Credits (ALC) Committee conducted two (2) workshops on 15 December 2020 and 16 December 2021 to finalize the committee recommendations on ALC assignments and entitlements. The objectives of the workshops were:

1. Synthesize the data collected from all academic units of UP Diliman;
2. Account for the varying factors in assigning ALC across academic units including, but not limited to: student population, number of degree programs, and research and extension services; and
3. Submit a report with recommendations on ALC assignments and entitlements (e.g., ALC + Honoraria, ALC only, Honoraria only) which may be fixed or variable.

During the initial meetings, the members had agreed that since the positions with fixed assignments are already articulated in the Faculty Manual, the focus will then be only on the variable ALCs which need to be standardized. Moreover, they agreed to standardize and differentiate the assignment of these variable ALCs according to the size of the unit (small, medium, large, and extra-large), number of degree programs, and number of research and extension services.

OUTPUTS

A. FACULTY LOAD CREDIT

The committee discussed the need to codify existing practices that stipulate when the ALC can be downgraded to 6 units; or when the ALC can be upgraded to 12, or 9 units; or when to add the variable ALCs with 1-3 units, especially for positions not identified in the Faculty Manual. The Committee agreed on the retention of the following policies on the Faculty load credit:

1. Regular full-time faculty members must have a minimum of 12 units per semester or 24 units per Academic Year (AY).
 - o Those WITHOUT administrative position/s require a minimum of 6 units Teaching Load Credit (TLC) per semester; the remaining units will be allocated for Extension Load Credit (ELC), Research Load Credit/Creative Workload Credit (RLC/CWLC), or Study Load Credit (SLC).
2. Regular full-time faculty can have a maximum total load credit (the sum of TLC, ALC, ELC, RLC/CWLC, and SLC) of 18 units per semester or 36 units per Academic Year.

- Only the combined TLC + ALC units (the latter to be covered by an official appointment) in excess of 12 units is subject to overload pay.
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- Per the *Faculty Manual Interim* (2011), Section 4.3 (a):

The maximum credit for research work (Research Load Credit or RLC), creative work (Creative WorkLoad Credit or CWLC), or any other form of productive scholarship or community extension service shall be six (6) units per semester. This shall not be used as basis for claiming honorarium for overload teaching.

- Faculty members should submit their requests for Study Load credits to the Office for Advancement of Teaching (OAT) for approval.

To further improve the distribution of faculty load credits, the Committee recommends the digitization of the Faculty Service Record (FSR) with the collaboration of the following Offices/Systems which shall be the data sources on the various load credits, namely:

1. the Computerized Registration System (CRS) - TLC
2. the Human Resource Development Office (HRDO) - ALC
3. Office of the Vice Chancellor for Research and Development (OVCRD) - ELC, RLC/CWLC
4. Office for the Advancement of Teaching (OAT) - SLC.

The Committee also recommends the alignment of deadlines of load credits by the OAT, HRDO and OVCRD in time for the submission of the FSR. This will ensure that the FSR can be generated by the CRS a week before the deadline for the submission of the FSR.

B. FIXED AND VARIABLE ALC

The Committee agreed to come up with an updated table on ALC assignments. In addition to "fixed" and "variable" ALCs, the new table will include "Others" for positions that are already existing in some colleges and are credited with a range of 1-3 ALC units. The actual ALC unit to be given will be determined by the recommending college/department/institute. Their recommendations should be based on the nature of the functions, approved organizational structure, size of the college/department, and the level of difficulty for performing the required tasks.

Further, recommendations not covered by the existing organization structure must come with strong justifications and updated organizational structures.

TABLE OF POSITIONS WITH FIXED ALCs

ADMINISTRATIVE POSITION	ALC
President, Vice Presidents, University Secretary, Chancellors, Assistant Vice Presidents, Assistant University Secretary, University General Counsel, Vice Chancellors, PGH Director	12 units
Faculty Regent, Deans, University Registrars, System Directors, Directors of principal units (defined as those who hold Director 1 positions and head offices under the Office of the Chancellor)	9 units*
Assistant Directors of System Offices, Constituent University Directors, Directors of sub-units (defined as those who hold Director 2 positions and head Centers, Institutes and Programs), Director of National Centers of Excellence, and High School Principals	6 units**

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TABLE OF POSITIONS WITH VARIABLE ALCs

ADMINISTRATIVE POSITION	ALC (UNITS)			
	less than 200	200 to less than 1,000	1,000 to less than 3,000	>=3,000
College Total Student Population				
1. College Secretaries, Directors of Institutes, Chairpersons of Departments	3	3	6	6
2. One 1 Associate Dean - For every 50 full-time faculty AND 200 or more student majors, (per the Faculty Manual):	-	3	6	6
3. One Assistant College Secretary (maximum of 2) - For every 1,000 student majors:	-	-	3	3
4. Deputy Director - unit level - Provided that the Center/Institute has 50 or more full-time professional and administrative staff:	-	3	3	3
5. Graduate Program Coordinator - unit level	3	3	3	3
6. NSTP Coordinator (for units offering NSTP courses)	3	3	3	3
7. College QA Officer	3	3	3	3

8. Data Protection Officer/ FOI Officer	3	3	3	3
Institute/ Department Total Student Population	less than 200	200 to less than 500	500 to less than 1,000	>=1,000
For 25 regular faculty/staff members and/or 100 student majors: Institute Deputy Director / Department Assistant Chair	3	3	3	3
<i>Another Institute Deputy Director/ Department Assistant Chair may also be appointed if the number of regular faculty/staff members is 50 or more and/or that of student majors is 200 or more, provided that an Associate Dean / Deputy Director at the College level has not been appointed/recommended.</i>				
<i>Whenever the need arises, the President may create additional positions of Associate Dean or Deputy Director upon recommendation of the Dean and concurrence of the Chancellor.</i>				
Institute/ Department QA Officer	3	3	3	3
Laboratory Head	1-2	1-2	1-2	1-2

For other administrative positions not mentioned above, ALC units may be given subject to the approval of the Chancellor. The recommended ALC units should be based on the level of difficulty of the required tasks, the nature of the functions, the size of the college/department, and the approved organizational structure.

The committee also agreed that the ALC units of an "Assistant" position should not be greater than or equal to the position being assisted.

C. REVISED COMPUTATION FOR TOTAL COLLEGE ALC ALLOCATION

The Committee has deemed it necessary to change the current College ALC Allocation Formula as the University has grown and expanded its functions, thereby resulting in reorganizations and additional mandated administrative positions (example: college-level and unit-level Quality Assurance Officers). Furthermore, given that an increasing number of our faculty members have been tapped to perform administrative tasks for UP Diliman and even at the System level, this has prompted the need to assign more ALC units as shown in the proposed increase below:

FROM:

$$\left(FT + \frac{PT}{2} \right) \times .85 = \text{total college ALC allocation}$$

TO:

$$\left(FT + \frac{PT}{2} \right) \times 1ALC = \text{total college ALC allocation}$$

Replacing the factor of the current formula for total college ALC allocation from .85 unit to 1 unit effectively increases the ALC load credit allotment for each faculty member, in addition to the nine (9) units of TLC and two (2) units for RLC/ CWLC, ELC and SLC. Two (2) units are allocated to RLC and ELC to give premium to the research functions of the university, while the 1 unit to ALC reflects the University's growing need for administrators to perform its other mandated functions.

Lastly, providing a higher multiplier to the formula will take into consideration all administrative positions not included in the given lists and the upcoming positions that will be created as the need arises.