



Orange Coast College

PDI: Professional Development Institute Handbook 2024-2025*



Full-Time Faculty: PDI assists full-time faculty in individual professional development by offering funding, salary advancement credit, or overload credit for a variety of professional development activities.

Part-Time 7.5+ LHE Faculty: PDI assists 7.5+ LHE part-time faculty by offering conference, class, or official, professional meeting funding.

Table of Contents on Pages 3-4

**For applications and detailed information go to the OCC Portal:
Committees → Professional Development Institute (PDI) → PDI Handbook**

**The procedures, rules, and regulations in this packet are subject to change.
See the contract for specific, legal details.*

*Gratitude, dedication and thanks to the Interest-Based Negotiations
PDI Subcommittee members who worked so diligently and collaboratively on the
numerous positive, intricate, and detailed changes to our faculty's PDI benefits
during interest-based negotiations:*

Amanda Best, IPD Chair, Golden West College

Marilyn Kennedy, PDI Chair, Orange Coast College

Cheryl Stewart, PDI Chair, Coastline College (now retired)

Kevin Ballinger, Dean, Consumer and Health Services (now retired)

*Additional thanks to all PDI/IPD Committee members and faculty from each
college who provided their wisdom and experience,
which was so necessary for these benefits to be imagined and made.*

Table of Contents

Introduction: Your Professional Development and Horizontal Salary Schedule Moves	5
o Placement and Movement on the Full-Time Faculty Salary Schedule	
o Academic Units vs. Professional Improvement Program Units	
o Time Frames and Limitations for Annual Horizontal Salary Schedule Moves.	
Chapter 1: Professional Development Institute Overview & Project Selection Guides	7
o PDI Committee Functions and Goals	
o PDI Committee and Subcommittees Structure	
o Meet the PDI Subcommittee Chairs and Get Contact Information	
o Which PDI Application & Subcommittee Is Best for Your Project?	
o <i>Which PDI Subcommittee Is Best for Your Project?— Chart</i>	
o How to Apply, Submit, and Complete a Project Application	
o <i>Frequently Asked Questions</i>	
Chapter 2: Alternative Methods: Full-Time Faculty	13
o Alternative Methods Subcommittee Functions and Goals	
o Application Processes and Timelines	
o The Seven Alternative Methods Project Options: Job Exchange, Job Shadowing, Mentoring, New Assignment, Production of Educational Materials, Professional Organization Activities, and Professional Publications	
o Application for Alternative Methods	
Chapter 3: Conference & Class Funding: Full-Time and 7.5+ LHEs Faculty	17
o Conferences & Class Funding Subcommittee Functions and Goals: Funding for Conferences, Classes, Workshops, and Professional Meetings	
o Funding for Attending or Presenting, Presenters' Quarterly Awards	
o Application Processes and Timelines	
o District Board Policies for Travel Funding and Reimbursement	
o Application for Conference & Class Funding	
Chapter 4: In-Service: Full-Time Faculty	19
o In-Service Subcommittee Functions and Goals	
o Creating, Attending, Presenting; Requesting Pre-Approval for All-Attendee/Blanket Approvals	
o Application Processes and Timelines	
o Application for In-Service	
o Attendance Sign-In Sheet for Pre-Approved PDI In-Service Workshops	
Chapter 5: Professional Improvement Credit: Full-Time Faculty	20
o Professional Improvement Subcommittee Credit Functions and Goals	
o Application Processes and Timelines	
o The Six Professional Improvement Credit Project Options: Seminars, Conferences, Off-Campus Workshops, Lower Division Coursework, Independent Study, and Work Experience	
o Application for Professional Improvement Credit	
Chapter 6: PDI Appeals Procedure	23
o PDI Appeals Procedure	

TABLE OF CONTENTS, CONTINUED

Chapter 7: Sabbatical Leave: Full-Time Faculty	24
○ Sabbatical Leave Subcommittee Function and Goals	
○ Eligibility, Funding, Length of Leaves, Compensation, Rules, Sabbatical Reports, Models of Sabbatical Reports	
○ Suggested Sabbatical Leave Proposal Study Types	
○ Guidelines for Planning and Preparing Your Proposal	
○ Sabbatical Leave Ranking Procedure	
○ Sabbatical Leave Application Processes and Timelines	
○ Application for Intent to File for Sabbatical Leave and Sabbatical Leave Dates to Remember	
○ Application for Sabbatical Leave	
○ The Sabbatical Leave Appeals Procedure	
Chapter 8: District Verification of Credits Earned	30
○ Verification of Credits Earned, Whom to Contact at the District	

Introduction: Your Professional Development & Horizontal Salary Schedule Moves

Welcome! Welcome to the PDI: Professional Development Institute’s Handbook, primarily focused on providing you with information on professional development opportunities and procedures for full-time faculty via PDI salary advancement credits, funding, and sabbatical leaves.


For part-time faculty who teach 7.5+ LHEs, the Conference and Class Funding Subcommittee also offers funding for conference, classes, workshops, and professional meetings.

Placement and Movement on the Full-Time Faculty Salary Schedule: When you were hired as a full-time faculty member, you were placed on one of five salary columns (the model to the right is the “AA Schedule” for 2016-2017 for 175-day faculty, but the newer one will be different amounts), based on your education, experience, and/or minimum qualifications. Over the years, you will *automatically move* down vertically based on your years of service in the Coast Community College District.

→ However, to move *horizontally to the next column* (within columns II through V*), you must *request* the move after you earn twenty (20) upper division or graduate units from an accredited institution **or** ten (10) upper division or graduate units from an accredited institution and ten (10) Professional Improvement Program units (salary advancement credits) granted through the Professional Development Institute (PDI) and submit that documentation of completion to District Personnel.

* A horizontal move from column I to II requires thirty (30) upper division or graduate units from an accredited institution, half of which may be PDI units.

APPENDIX A


Faculty - 175 Days (AA Salary Schedule)
 Effective 2018-2019 Academic Year
 Units: Annual

Step	I	II	III	IV	V	Step
1	\$ 52,394	\$ 59,463	\$ 64,160	\$ 68,841	\$ 73,609	1
2	\$ 55,009	\$ 62,090	\$ 66,776	\$ 71,462	\$ 76,231	2
3	\$ 57,634	\$ 64,704	\$ 69,395	\$ 74,077	\$ 78,846	3
4	\$ 60,251	\$ 67,328	\$ 72,020	\$ 76,697	\$ 81,472	4
5	\$ 62,866	\$ 69,937	\$ 74,635	\$ 79,314	\$ 84,089	5
6	\$ 65,487	\$ 72,562	\$ 77,255	\$ 81,935	\$ 86,709	6
7	\$ 68,103	\$ 75,182	\$ 79,867	\$ 84,549	\$ 89,326	7
8	\$ 70,723	\$ 77,800	\$ 82,495	\$ 87,173	\$ 91,951	8
9	\$ 73,345	\$ 80,421	\$ 85,108	\$ 89,786	\$ 94,564	9
10	\$ 75,959	\$ 83,034	\$ 87,728	\$ 92,411	\$ 97,180	10
11		\$ 85,649	\$ 90,344	\$ 95,027	\$ 99,804	11
12		\$ 88,271	\$ 92,964	\$ 97,643	\$ 102,416	12
13			\$ 95,581	\$ 100,264	\$ 105,041	13
14				\$ 100,264	\$ 105,041	14
15				\$ 104,240	\$ 109,016	15
16				\$ 104,240	\$ 109,016	16
17				\$ 108,212	\$ 112,990	17
18				\$ 108,212	\$ 112,990	18
19				\$ 108,212	\$ 112,990	19
20				\$ 112,190	\$ 116,963	20
21					\$ 116,963	21
22					\$ 116,963	22
23					\$ 120,938	23
24					\$ 120,938	24
25					\$ 120,938	25
26					\$ 124,911	26

Effective 2018-2019 Academic Year - 2.71% COLA + 1.0% Increase = 3.71% Total
 Doctoral Stipend: \$3,056

Academic Units vs. PDI Professional Improvement Program Units/Salary Advancement Credits and Requesting a Horizontal Move:

- **Academic Units:** You may submit documentation for *your upper division or graduate academic units* from an accredited institution directly to District Personnel Human Resources Analysts Kyla Bentley (kbentley3@ccd.edu or 714-438-4719).
- **PDI Professional Improvement Program Units/PDI Salary Advancement Credits:** PDI submits the documentation to District Personnel for your PDI pre-approved professional development activities after they have been verified by PDI as completed. This documentation is submitted directly to District Personnel Human Resources Analysts Kyla Bentley (kbentley3@ccd.edu or 714-438-4719). You may be copied in most or all of these notifications.

Time Frames and Limitations:

1. **Graduate and Upper Division Units from an Accredited Institution and Horizontal Column Moves/September 15:**

CCCD District Personnel processes horizontal column moves annually; all academic transcripts must be submitted to the District by September 15 to be eligible for that academic year move.

2. **PDI and Completions/Horizontal Column Moves/September 1:**

Your completions of pre-approved PDI projects must be submitted to PDI for verification of completion by September 1 so that PDI may report earned professional improvement units/salary advancement credits to District Personnel by September 15.

SEPTEMBER						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1 <small>Completed Projects Due to PDI</small>	2	3	4	5
6	7	8	9	10	11	12
13	14	15 <small>Transcripts Due to District Personnel</small>	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

PDI

3. **PDI Credit Limitations for Horizontal Moves:** You may use PDI professional improvement units/salary advancement credits for up to fifty percent (50%) of each horizontal column move. However, please note these additional limitations for horizontal moves and PDI credits:



- ➔ only eight (8) PDI units may be counted *annually* for each specific type of PDI project (such as independent study, professional publications, etc.) *except* lower division coursework which has no limitations (if PDI-pre-approved).
- ➔ only ten (10) PDI units may be counted *overall* for each horizontal column move for each specific type of PDI project *except* lower division coursework (if pre-approved by PDI). *PDI pre-approved lower division coursework automatically counts as academic unit- for-unit work.*

Ready to see what PDI can do to assist you in your professional development needs?

Chapter 1: Professional Development Institute Overview & Project Selection Guides

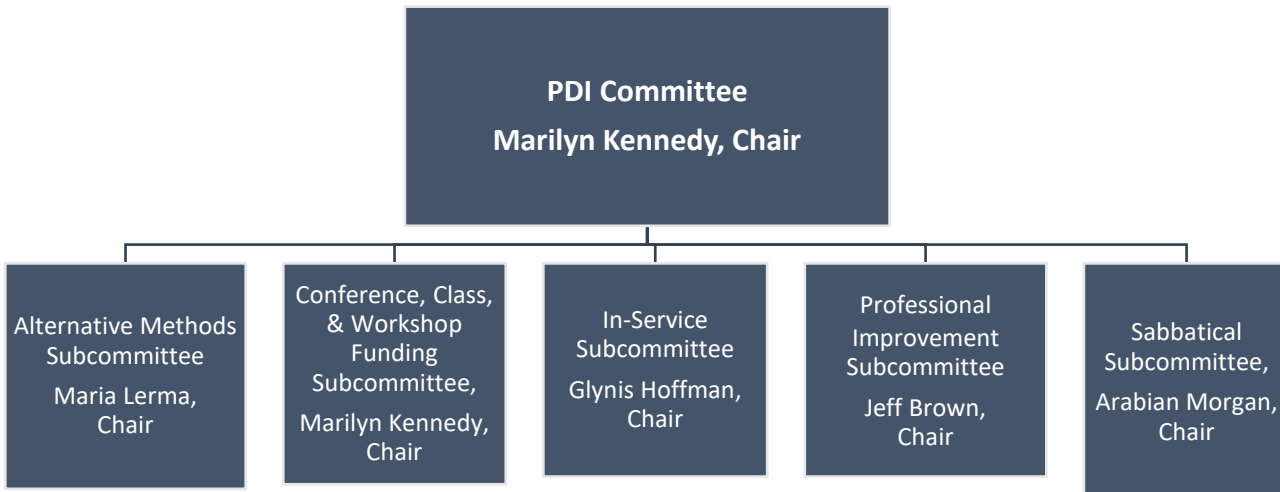
PDI FUNCTIONS AND GOALS

Full-Time Faculty: PDI encourages and assists full-time faculty in their professional development goals by offering funding, overload banking, or salary advancement credit for a variety of professional development activities. PDI oversees this program of professional development as per the methods below:

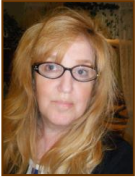
- advises the college administration and Academic Senate on professional development;
- establishes criteria and guidelines for granting approval as per the contract;
- arranges procedures by which faculty can meet those objectives;
- informs faculty of professional development opportunities, funding, and timelines; and
- makes recommendations that ultimately reach the Board of Trustees.

Part-Time 7.5+ LHE Faculty: PDI encourages and assists part-time 7.5+ LHE faculty in their professional development goals by *offering funding only* for conferences, classes, and official, professional meetings. (*Part-time faculty who wish to move over on the salary schedule may do so by taking graduate or post-graduate level courses pre-approved by the District; contact Kyla Bentley (kbentley3@cccd.edu or 714-438-4719).*)

PDI COMMITTEE & SUBCOMMITTEES STRUCTURE



Meet the PDI Subcommittee Chairs & Get Contact Information



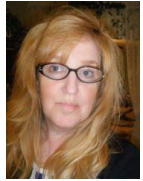
PDI Committee Chair

Marilyn Kennedy: profmkenedy@aol.com or mkenedy@occ.cccd.edu
x25597 x1



Alternative Methods Subcommittee Chair

Maria Lerma: mlema@occ.cccd.edu x25714



Conference Funding Subcommittee Chair

Marilyn Kennedy: profmkenedy@aol.com x25597 x1



In-Service Subcommittee Chair

Glynis Hoffman: ghoffman@occ.cccd.edu x25747



Professional Improvement Credit Subcommittee Chair

Jeff Brown: jbrown@occ.cccd.edu x23070



Sabbatical Leave Subcommittee Chair

Arabian Morgan: amorgan@occ.cccd.edu x23107

Which PDI Application & Subcommittee Is Best for Your Project? Projects Must Be Pre-Approved—See Timelines on Applications

Applications & Information Packets: Applications and information packets may be accessed at the PDI site on the OCC Portal: OCC Portal → Committees → Professional Development Institute (PDI). You may locate applications on the PDI subcommittee pages (tabs on the left) or by requesting them directly from the PDI Chair at profmkennedy@aol.com or mkennedy@occ.cccd.edu

Limitations: You may apply for funding or salary advancement credits, but not both for the same project. You may **not** apply for or receive PDI funds if you will be receiving funds through other Coast Community College District funding or are receiving Flex credit for the activity/project.

Questions? Contact PDI Chair Marilyn Kennedy at mkennedy@occ.cccd.edu or profmkennedy@aol.com

ALTERNATIVE METHODS (Full-Time Faculty Only): Recommends **overload pay (stipend) OR salary advancement credit** for the following non-traditional methods of professional development: job exchange, job shadowing, mentoring, new assignment preparation, production of educational materials, professional publications, and professional organization activities

CONFERENCE FUNDING (Full-Time and Part-Time 7.5+ LHE Faculty Only): Recommends **funding only** for conferences, classes, workshops, and official, professional meetings where the faculty member attends or presents.

IN-SERVICE TRAINING (Full-Time Faculty Only): Recommends **salary advancement credit only** for on-campus or District workshops where the full-time faculty member attends or presents.

PROFESSIONAL IMPROVEMENT (Full-Time Faculty Only): Recommends **overload pay (stipend) OR salary advancement credit** for the following methods of professional development: independent study, work experience, lower division coursework (salary advancements credits as unit-for-unit academic credits), and off-campus workshops or seminars. Recommends **salary advancement credits only** for conferences.

SABBATICAL LEAVE (Full-Time Faculty Only, after no less than six consecutive years of service): Recommends **sabbatical leaves** of two half semesters, one full semester, or two full semesters (which can be taken one semester at a time over a three-year period or all in one year).

Need More Help? See the chart on the next page for more specifics → .

WHICH PDI SUBCOMMITTEE IS BEST FOR YOUR PROJECT?—CHART

You may apply for either funding or salary advancement credits, not both.

Directions: Locate your project type below then use the check marks to locate the appropriate sub-committee based on your preference for funding, sabbatical, overload pay, or salary adv. credits.	ALTERNATIVE METHODS (Full-Time Faculty) <i>Funding, Overload Pay, or Salary Advancement Credits</i>	CONFERENCE FUNDING (Full-Time & Part-Time 7.5+ LHEs Faculty) <i>Funding Only</i>	IN-SERVICE TRAINING (Full-Time Faculty) <i>Salary Advancement Credits Only</i>	PROFESSIONAL IMPROVEMENT (Full-Time Faculty) <i>Funding, Overload Pay, or Salary Advancement Credits</i>	SABBATICAL LEAVE (Full-Time Faculty, after six consecutive years of service) <i>Sabbatical Leave Time</i>
Conference, Class, Workshop, or Official, Professional Meeting Attendance/Presentation		✓		✓	salary adv. credits only
Coursework—Lower Division		✓		✓	Academic unit-for-unit credits only
Coursework—Upper Division or Graduate		✓		✓	No PDI pre-approval required for full-time faculty; check with District before taking course—see Note 1. Must be pre-approved by District for part-time faculty—see Note 2.
Coursework—Extended or Continuing Education		✓		✓	Contact District for acceptability before taking—see Note 1.
Independent Study				✓	
Job Exchange	✓				
Job Shadowing	✓				
Mentoring	✓				
New Assignment Preparation	✓				
Publications, Professional	✓				
Production of Educational Materials	✓				
Professional Organization Activities	✓				
Sabbatical Leave					✓
Seminar Attendance or Presentation, Off-Campus				✓	
Work Experience				✓	
Workshops, Attendance or Presentation, Off-District				✓	
Workshops, Attendance or Presentation, Off-District			✓		

Note 1: Per CFE Contract, “After initial placement, horizontal scale adjustments for lower division units and/or Professional Development Institute (IPD/PDI) units shall only be authorized by the college body (IPD/PDI) Committee. Professional Improvement Program units for all academic work must be upper division or graduate level, unless lower division units specifically authorized in advance by PDI/IPD.” **If you are not sure if an upper division, graduate, extended education, or continuing education course will be counted as upper division or graduate academic credits, contact Kyla Bentley (714-438-4719 or kbentley3@cccd.edu) before taking the course.** **Note 2:** As per CFE MOU #15-17 (Oct. 2015) for 7.5+ LHE Part-Time Faculty, “The District shall determine what constitutes acceptable graduate or post-graduate level courses . . . undergraduate courses, extension courses, and continuing education work will not be considered for initial placement or column movement.” Contact **Kyla Bentley (714-438-4719 or kbentley3@cccd.edu)**.

How to Apply, Submit, and Complete a Project Application



1. Select the Appropriate PDI Subcommittee Application and Information Packet:

Review pages 9 and 10 and select the appropriate PDI subcommittee for your project. (If you still have questions, contact the PDI Chair.) You may apply for funding, salary advancement credit, or overload pay, depending on the activity, **but you may only receive funding or salary advancement credit for each professional activity, not both. You may not receive duplicate funding from the College or District for the PDI project; you may not receive Flex credit for the same PDI activity/project.**

2. Apply and Observe Timelines (The timelines vary due to District policies):

Access applications and information packets from this handbook or online at the Portal → “Committees” → “Professional Development Committee (PDI)” → the appropriate subcommittee tab. Applications are located under “Key Documents.” (You may also contact the PDI Chair for an application and information packet.) Submit your application prior to starting your project and by the timelines on the application. Requests for approval must be submitted PRIOR to undertaking the work; however, under exceptional circumstances the request for approval may be submitted up to six (6) weeks after the event; **retroactive approval is NOT guaranteed.**

3. Wait for Review by the Subcommittee: The subcommittee chair or PDI chair will inform you when your application is initially received—then if it is approved, denied, or a revision is requested. If you are concerned about the status of your application, contact the subcommittee chair or the PDI Chair.

- **Salary Advancement Credits:** If your application is for salary advancement credit you may begin your project once the subcommittee has notified you that your project has been officially approved. The timeline for application review is about two weeks.
- **Conference, Class, Workshop, or Official, Professional Meeting Funding for Domestic Travel (Within the Contiguous United States) Travel:** If your application is for funding for a domestic conference, class, workshop, or professional meeting, your application must be approved by PDI and the College President *prior to conference travel and attendance. The timeline for review is about three weeks.*
- **Conference, Class, Workshop, or Official, Professional Meeting Funding for International Travel (Outside of the Contiguous United States) Travel:** If your application is for funding for an international conference, class, workshop, or professional meeting, your application must be approved by PDI, the College President, and the Board of Trustees *prior to conference travel and attendance.* Application review timelines are six weeks or more for international travel, aligned with BOT meeting dates.
- **Overload Pay (Stipends of \$500.00 to \$2000.00):** If your application is for overload pay (stipend), please note that your project must be officially approved by PDI and the college administration prior to beginning your work. The application review timeline is about two weeks. ***The final date for submission of an application for a stipend for that same fiscal year is the first week of the spring semester.***

4. Completion and Verification for Alternative Methods, In-Service, and Professional Improvement Subcommittee Projects:

Submit your proof of completion (as noted specifically on your approved PDI application) by the date indicated. If you submit your completion verification past the deadline you may not receive funding (even if funding was approved) for your project due to District fiscal year deadlines and fund availability. Please note that In-Service workshop attendance sheets (your proof of completion for college and District workshops) are submitted to PDI by the workshop presenter.

FREQUENTLY ASKED QUESTIONS



“I’m just not sure which PDI subcommittee is right for my project. How do I know?”

—See the guidelines on pages 9 and 10 in this handbook or contact the PDI Chair.

“I turned in my request for a project and I have not received any notification or paperwork telling me that my request has been approved. What’s going on?”

—If you not been contacted and want to confirm that your application was received and/or approved, contact the appropriate subcommittee chair or the PDI Chair. Allow extra time for processing your application if you applied via print/hard copy rather than electronically.

“I just returned from a conference I paid for myself and realized that I should have applied for units. Is there any way I can apply after the fact?”

—Not usually. The requests for approval for salary advancement credits must be submitted PRIOR to undertaking the work; however, under exceptional circumstances the request for approval may be submitted up to six (6) weeks after the event; **retroactive approval is NOT guaranteed. However, if you want money for the conference, it MUST be PDI and President-approved BEFORE you attend, and also Board pre-approved if it is out of the contingent United States.**

“I am putting together an independent study program. How do I show proof of completion?”

—A time log is the best way. You can use an excel worksheet and log all of the hours with specific dates and times that you worked on your independent study. Turn that in when you have completed the project if that is part of your official completion and verification process on your approved application.

“I just turned in my completion proof for a project and have not received any verification that the credits were recorded in the Personnel Office at the District.”

—The subcommittee chair will approve your completion or will request additional verification from you. Once your completion is approved by the subcommittee chair, you will be notified. PDI notifies District Personnel electronically of most PDI completions and you should be copied in that email. Please note that completions for PDI In-Service projects (campus workshops) are sent to the District via paper forms. You may check with PDI or the District if you wish to know the status of those completions.

“I want to make a horizontal move on the salary schedule. What is the deadline for submitting all documentation to do so?”

—In order to make a horizontal move for the school year, all PDI completion documentation must be submitted to PDI by September 1 in order for PDI to process and send it to the District by September 15. Send documentation for upper division and graduate credits from accredited institutions directly to the District to Kyla Bentley (714-438-4719 or kbentley3@ccc.edu).

“There is no more funding available this fiscal year and I wish to attend a conference. What can I do?”

—If you are full-time faculty, consider applying for salary advancement credit through the Professional Improvement Credit subcommittee instead if you are not in column V of the salary schedule.

“How often can I apply for a sabbatical?”

—You may apply after six consecutive years of service.

“How long may I take a sabbatical for and what is the compensation I will receive?”

—Sabbaticals may be taken for two half semesters for 100% pay, one semester for 100% pay, or two semesters for 60% pay. You may also “split” your two-semester sabbatical and take the semester leaves during a three-year period at 60% pay for each semester you are on sabbatical.

“I know I need to write up a sabbatical report within sixty (60) calendar days after returning to duty. Is there a place I can look for models of past reports?”

—Yes, you may find models on the Portal: Go to the Portal → “Committees” → “Professional Development Institute (PDI)” → “Sabbaticals” → Look in the area on the right side called “Important Documents.” Sabbatical reports are also kept in the OCC Library. Go to the front desk for access.

“What are the consequences of not turning in a sabbatical report?”

—As per the CFE Contract, “If a report is not submitted within sixty (60) calendar days after returning to duty, a notice shall be sent to the faculty member and the Federation by the College President or designee indicating that if the report is not submitted within fourteen (14) calendar days, it will be deemed a failure to complete a service requirement of the sabbatical and the employee’s bond will be forfeited and the employee’s timeline clock for a new sabbatical will not be started until the sabbatical report is submitted.”

Chapter 2: ALTERNATIVE METHODS: Full-Time Faculty Only

Salary Advancement Credits or Funding (Stipends) for Job Exchange, Job Shadowing, Mentoring, New Assignment, Production of Educational Materials, Professional Organization Activities, and Professional Publications

Contact Information: Maria Lerma, Subcommittee Chair, mlerma@occ.cccd.edu or x25714

Alternative Methods Functions and Goals: Alternative Methods encourages and assists full-time faculty in their professional development goals by offering salary advancement credit or overload pay (in stipends of \$500.00 to \$2000.00) for seven very specific types of professional development activities: job exchange, (2) job shadowing, (3) mentoring, (4) new assignment, (5) production of educational materials, (6) professional organization activities, and (7) professional publications.

Processes and Timelines for Application and Approval: Applications are accepted during the fall and spring semesters only. All applications must be pre-approved prior to the initiation of the project. Below are the timelines, processes, and requirements. Funding is very limited, so apply early:

- ⇒ **Salary Advancement Credit Applications/Timelines:** Submit during the fall or spring semesters, at least two weeks prior to the beginning of the project, but no later than May 1 in the spring semester and December 1 in the fall semester.
- ⇒ **Overload Pay (Stipend) Applications/Timelines (\$500.00 to \$2000.00):** Submit during the fall or spring semesters (Dec. 1 and May 1 are semester deadlines), at least two weeks prior to the beginning of the project and no later than the end of the first week of the spring semester for payment during that same fiscal year. You may submit early for the next fiscal year—the fiscal year runs from July 1-June 30.

Are You Eligible for a Stipend? According to the contract “A faculty member on schedule ‘AA’ or ‘QQ’ who is on the last regular step of any column, or on any longevity step of column IV, or on any step of column V, of the salary schedule, and who desires to pursue a program of professional improvement may be compensated by released time or overload pay.” **Verification of completion of pre-approved work must be submitted to the Alternative Methods Chair and the PDI Chair no later than May 1 of the fiscal year you applied for in order to be paid.**

IMPORTANT for PAYMENT: Submit the verification of your completed project to the Alternative Methods Chair and the PDI Chair no later than May 1 of the fiscal year that you were approved for; if you submit your verification late you may not be paid due to District fiscal timelines.

IMPORTANT FOR HORIZONTAL SALARY COLUMN MOVES: Submit the verification of your completed project to the Alternative Methods Chair and the PDI Chair no later than September 1 in order to make a horizontal move on the Salary Schedule for the school year. Official documentation by PDI is then submitted to the District no later than September 15.

The Seven Alternative Methods Project Options

1. Job Exchange: This program enables a faculty member to gain professional credit by exchanging jobs with a person in a teaching or non-teaching position at an outside district agency, public or private, which is related to the faculty member’s assignment. A regular faculty member is eligible to apply for job exchange credit after completing four years of full-time teaching in the District. A faculty member must coordinate any scheduling issues with his/her dean.

Eligibility/Guidelines: A regular faculty member is eligible to apply for job-exchange salary advancement credit after completing four years of full-time teaching in the District. Participation in this exchange must be directly related to the faculty member’s instructional discipline or assignment. The exchange must involve unique and unusual opportunities of benefit to the faculty member, the student, and the college. The person from the outside agency must hold proper credentials necessary to assume the faculty member’s position. Salaries need not be exchanged. The faculty member will receive normal salary payments from the District. The outside agency will agree to pay its employee a regular salary. The work of the faculty member must be directly and adequately supervised by a person with superior knowledge in the field of employment. The length of working arrangement will be negotiated, but it must be on a full-time basis (36 hours per week). The approximate number of hours for completion must be submitted for approval with the application.

**Standards for Receiving Job Exchange Salary Advancement Credits,
Funding (Stipend), or Overload Banking Credit**

Salary Advancement Credits: Thirty-six (36) hours working in a job exchange = one (1) job exchange salary advancement credit.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

Overload Banking Credit: Thirty-six (36) clock hours or work = one (1) unit of overload banking credit

2. Job Shadowing: This program enables a faculty member to observe, evaluate, and work with an expert or professional whose occupation is related to the faculty member's own academic specialization.

Guidelines: The job shadowing must augment or enhance the faculty member's understanding of his/her field. Job shadowing must relate to a faculty member's assignment objective and must provide benefit to the students or the district. Here are a few examples of job shadowing:

- **Political Science:** A faculty member would sit side-by-side with a city manager in order to follow day-to-day operations in the management of local government affairs.
- **Psychology:** A faculty member would observe methods employed by a licensed professional in the field of mental health at an institution such as Fairview Hospital.
- **Science:** A faculty member may do field work with experts in private industry who are involved in the practical application of scientific theory (pharmaceutical firms, solar technology development, etc.).
- **Vocational:** A faculty member would interview and observe a management professional in any of the various vocational fields, observing application of new techniques and use of the latest technical equipment.

**Standards for Receiving Job Shadowing Salary Advancement Credits,
Funding (Stipend), or Overload Banking Credit**

Salary Advancement Credits: The approximate number of hours for completion must be submitted with the application. Thirty-six (36) hours of job shadowing = one (1) job-shadowing salary advancement credit. Eighteen (18) hours of job shadowing = one-half (1/2) job-shadowing salary advancement credit; no less than eighteen (18) hours will be considered. A faculty member may not job shadow one expert for more than three (3) units of credit. No more than eight (8) job shadowing units may be counted toward salary advancement in any one year. No more than ten (10) job shadowing units may be used in moving from one salary schedule column to the next higher column.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

Overload Banking Credit: Thirty-six (36) clock hours of work = one (1) unit of overload banking credit

3. Mentoring: This program enables an experienced, tenured faculty member to motivate new faculty toward continuing self-education and a mentee benefits from this mentoring. A mentor offers guidance, wisdom, experience, and encouragement, and is one who explores and supports teaching and learning with new colleagues. A mentor is not supervisory, nor evaluative, but is willing to explore tough questions about practical professional life. A mentor communicates not only where and how to get things done, but explains the unwritten rules about how we function at Coast Community College District, the political circumstances in which decisions get made, the diverse campus cultures and values, and our unspoken expectations. Some topics of interest might be these: academic honesty policies, admissions and records rosters, applications for professional development through PDI, horizontal salary movement, the bookstore and text ordering, the campus portal, clerical support, creating helpful syllabi, class management, lesson plan development, curriculum development and innovation, grading standards, using the library, matters of student discipline, multimedia services, reprographic services, room facilities, sexual harassment policies, student petitions, testing methods, SLO assessment, and disabled student services.

Guidelines: A mentor must be agreed to by the mentee. The mentor must not be a member of the new faculty's tenure/evaluation team. The mentor must be available for the mentee, dealing one-on-one in answering questions or sometimes attending appropriate activities with the mentee.

**Standards for Receiving Mentoring Salary Advancement Credits,
Funding (Stipend), or Overload Banking Credit**

Salary Advancement Credits: At the time of submission for approval the approximate number of hours required for submission must be declared. Eighteen (18) hours of time spent in a mentoring role = one (1) unit of salary advancement credit. No more than eight (8) units of mentoring credit may be counted in any one school year. No more than ten (10) mentoring units may be used in moving from one salary schedule column to the next higher column.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

Overload Banking Credit: Eighteen (18) clock hours of work = one (1) unit of overload banking credit.

4. New Assignment: This program is designed to augment or enhance an instructor's knowledge and understanding in order to undertake a new assignment, teach a new course, or maintain currency in a current assignment. Programs may involve unique and unusual opportunities for growth or retraining. This program may also allow instructors to develop instructional skills and material in a new teaching method, mode, style, or focus.

Guidelines: Besides the above requirements, *any faculty member undertaking a new assignment mandated by the college, the district, or by state mandates, would qualify under the above program.*

**Standards for Receiving New Assignment Salary Advancement Credits,
Funding (Stipend), or Overload Banking Credit**

Salary Advancement Credits: At the time of submission for approval the approximate number of hours required for submission must be declared. Eighteen (18) clock hours spent on the preparation for a new teaching assignment = one (1) unit of salary advancement credit. No more than eight (8) units of new assignment credit may be counted in any one school year. No more than ten (10) new assignment units may be used in moving from one salary schedule column to the next higher column.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

Overload Banking Credit: Eighteen (18) clock hours of work = one (1) unit of overload banking credit.

5. Production of Educational Materials: This program enables the faculty member in the development of educational materials that augment or enhance the professional growth of the faculty member.

Guidelines: The educational materials such as Power Point presentations and workbooks that are produced must be original creations for classroom use, including large lecture halls or laboratories or other on-campus instructional facilities. The educational materials shall be applicable to the instructional program in the Coast Community College District. The work must be of unusual or unique benefit to students, other faculty members, or the District.

**Standards for Receiving Production of Educational Materials Salary Advancement Credits, Funding
(Stipend), or Overload Banking Credit**

Salary Advancement Credits: The approximate hours required for completion must be declared at the time of submission for approval. Eighteen (18) hours of time spent in the production of educational materials = one (1) unit of credit. No more than eight (8) units of production of educational materials credit may be counted in any one school year. No more than ten (10) production of educational materials units may be used in moving from one salary schedule column to the next higher column.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

Overload Banking Credit: Eighteen (18) clock hours of work = one (1) unit of overload banking credit.

6. Professional Organization Activities: This program enables a faculty member who participates in an ongoing leadership or membership role with a professional organization outside the district to gain professional development credit.

Guidelines: The professional organization must either be related to the general teaching profession or to the discipline in which the faculty member holds an assignment. The leadership or membership role within the organization could be a major one such as president or vice president, chair of a major committee or of a major project. The experience in this leadership or membership role must bring unique or unusual benefits to the students, other faculty, the college, or the district.

Standards for Receiving Professional Organization Activities Salary Advancement Credits, Funding (Stipend), or Overload Banking Credit

Salary Advancement Credits: At the time of submission for approval the approximate number of hours required for submission must be declared. Eighteen (18) hours of time spent in an ongoing leadership or membership role with a professional organization = one (1) unit of salary advancement credit. No more than eight (8) units of professional organization activities credit may be counted in any one school year. No more than ten (10) professional organization activities units may be used in moving from one salary schedule column to the next higher column.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

Overload Banking Credit: Eighteen (18) clock hours of work = one (1) unit of overload banking credit.

7. Professional Publications: The work must enhance or augment an instructor's knowledge and understanding in courses taught. These publications must provide opportunities that are of unique benefit to students and/or other faculty or the college.

Guidelines: Publications include articles of educational value, the presentation of a paper to a professional meeting, the production of works with creative merit (such as literary reviews, articles in professional journals, and other academic writing) as judged by the Committee on Alternative Methods or other professional boards, or syllabi, novels, and textbooks, that are not remunerated by the District. Publications that are written as part of an assigned District or College contract or by a District grant are excluded from this program.

Standards for Receiving Professional Publications Salary Advancement Credits, Funding (Stipend), or Overload Banking Credit

Salary Advancement Credits: The approximate hours required for completion must be declared at the time of submission for approval. Eighteen (18) hours spent on the preparation of the work = one (1) unit of salary advancement credit. No more than eight (8) units of professional publications credit may be counted in any one school year. No more than ten (10) professional publications units may be used in moving from one salary schedule column to the next higher column.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

Overload Banking Credit: Eighteen (18) clock hours of work = one (1) unit of overload banking credit.

Chapter 3: CONFERENCE & CLASS FUNDING: Full-Time and 7.5+ LHE Part-Time Faculty

Funding only for conferences, classes, workshops, and official, professional meetings
**Contact Information: Marilyn Kennedy, Subcommittee Chair, profmkennedy@aol.com
x25597**

The Conference Funding Subcommittee provides financial support *only* for full-time faculty and 7.5+ LHE part-time faculty to attend professional conferences, classes, workshops, and official, professional meetings; if you are full-time faculty and wish to earn salary advancement credit *instead of* requesting funding for attending an off-campus conference or wish to earn academic units instead of requesting funding for taking a class, apply to the Professional Improvement Credit Subcommittee. ***You may receive funding only if you are not receiving salary advancement credit or academic credit for salary advancement; you may not receive funding for a conference paid for from District funding.***

Funding Grants and Availability for Fiscal Year (July 1-June 30): Funding is available for attending or presenting at conferences and official, professional meetings, or for taking workshops or classes that are related to the District's education program and the Faculty Member's professional growth. Ninety percent of PDI conference funding is for individual faculty professional development related to that faculty member's discipline or teaching in the classroom. Ten percent of PDI conference funding may be allocated for conferences related to a faculty member's role in the college or district as it relates to an educational program or a special situation as per the faculty member's unique role (chair, coordinator, coach, etc.), "for conferences of a general import to the educational program of the College; a special situation which would require the allocation of substantial expenses; and conferences that the District requests a Faculty Member to attend as its representative." This means that requests for funding will be judged and allocated according to the degree to which the conference benefits the faculty member, the students, and/or the college.

- ❖ **Full-Time Applicants:** A fiscal year maximum of \$3,000.00 per full-time applicant is awarded for the expenses of a conference, class, workshop, or official, professional meeting where you attend or present. Funding is limited; apply as early as possible; ***you may apply up to ten months in advance.***
- ❖ **Full-Time Presenters:** If you are presenting at an off-campus conference or official, professional meeting and you need extra salary advancement credits or funding or preparing your presentation, contact the PDI Chair about applying via Alternative Methods or Professional Improvement Credits.
- ❖ **7.5+ LHEs Part-Time Applicants:** A fiscal year maximum of \$3000.00 per fiscal year, per 7.5+ LHEs part-time applicant, is awarded for the expenses of attendance or presentation at a conference, class, workshop, or official, professional meeting. Funding is limited, so it is best to apply as early as possible; you may apply up to ten months in advance. ***You must be teaching 7.5+ units during the semester of conference attendance.***

The Application Process:

- ❖ **Application Paperwork:** There are ***two forms*** required for the application process, both on the PDI portal site: : "Committees" → "Professional Development Institute (PDI)" → "PDI Universal Application" and "CAR Fillable form:
 - (1) **The PDI Universal Application**
 - (2) **The District "Conference Authorization Request Form" (PDF Fillable form)**
- ❖ **Timelines and Due Dates:** ***Applications are accepted during the fall and spring semesters only—up to May 1 for the spring semester and up to December 1 for the fall semester.***
 - **Domestic Conferences, Classes, Workshops, or Official Professional Meetings (Within the Contiguous United States):** Please submit both your application forms during the fall or spring semesters ***at least three weeks prior to the date of your planned attendance. You need PDI approval and OCC Presidential approval prior to attendance.***
 - **International Conferences, Classes, Workshops, or Official Professional Meetings (Outside of the Contiguous United States):** Please submit both your application forms during the fall or spring semesters ***at least six weeks prior to the District Board Meeting date before your conference—see chart due dates on the application itself for essential timelines. You must have Board approval prior to the date of your conference travel and attendance.*** If your application is late, it may not be accepted. This at-least-six-weeks' timeline is the minimum necessary, as official OCC administration and CCCD Board approval is required.

Unfortunately, **approval for PDI funds for conferences, classes, and official, professional meetings cannot be funded retroactively.** However, if you are concerned about funding or timelines, applications may be submitted up to ten months in advance; if you do not have all of the information at that time, you may apply and inform the Chair, who will assist you in gathering that information. If you attended a summer conference but did not apply for funding, the Professional Improvement Subcommittee will accept retroactive applications for review for salary advancement credit only up to September 1; retroactive approval is NOT guaranteed.

- ❖ **After Your Application Submission:** You will be notified via email if your application is PDI approved, denied, or a revision is requested. If your application is not approved, you may revise and reapply.

If You Wish to Obtain Advance Payments Prior to Attendance: Contact the District Accounting-Travel Office at 714-438-4600 Ext. 84662. Daily rates and instructions for advance are printed on the Board of Trustees' *Letter of Authorization*.

Requesting Reimbursement of Conference Travel Expenses: Submit no later than ten (10) days after conference attendance to the Campus Business Office (x25698).

Board Policies Governing Conference/Travel Reimbursement AP Travel Policy

Each person authorized to attend a conference using District funds will receive a *letter of authorization* with a *claim for reimbursement* attached from the Board office. The reimbursement form should be submitted to Accounting-Travel whether you have reimbursable out-of-pocket expenses or not. When you submit a reimbursement form with a zero claim, it enables the District to close your file. This form must be submitted through appropriate channels to Accounting-Travel within ten (10) days after completion of the conference/travel, **even if there is no balance due** (except for those with a control number beginning with "N"). All claims for travel shall be itemized on a ***Conference Claim for Reimbursement form***.

Claim for Reimbursement—Attach original paid receipts or documentation which shows proof of purchase:

1. Fill in the *claim for reimbursement form* completely
2. List only those expenses for which reimbursement is requested. The claimant cannot be reimbursed for the following: tips (unless printed on the bill), personal phone calls, extra hotel amenities (such as movie rentals), membership fees, expenses of spouse or other family members, any items not covered by board approval.
3. **Meals** (rates and instructions are listed on the Claim for Reimbursement)
4. **Mileage** - travel by regular scheduled air coach shall be the expected mode of travel outside the Orange County, Los Angeles, Riverside, San Bernardino and San Diego county areas for all District-authorized travel. Travel by personal automobile must be specifically authorized and reimbursement will be made based on exact mileage, but **not to exceed air coach equivalency**. It is the claimant's responsibility to submit a price quote from an outside source (such as a travel agency, Internet, etc.) for air coach equivalency for the exact same dates passenger would have flown.
5. **Phone calls**, work related (must be listed on hotel bill)
6. **Reasonable taxi/shuttle/limousine fees** - transportation reimbursement shall include mileage to and from the airport when air travel is involved. Those individuals receiving a mileage stipend will only be allowed to claim reimbursement for mileage to and from the airport from the Orange County line if they are flying out of an airport, other than John Wayne, Orange County.
7. If registration is not prepaid by the District, but is requested for reimbursement, a **paid receipt must be submitted** to insure prompt payment of the claim.
8. Claim form must have at least two signatures: Claimant and Division and/or College President/Business Manager
Once the District approves your reimbursement, a notification slip indicating the availability of your check form the OCC Bursar's Office will be placed in your faculty mailbox.

Chapter 4: IN-SERVICE: Full-Time Faculty Only

OCC, GWC, Coastline College & CCC District Workshops

Salary advancement credit only (no funding) for attendance or presentation

Mission and Goals: The PDI In-Service Subcommittee assists full-time faculty in earning *salary advancement credits* for attendance or presentation of in-service workshops at OCC, GWC, Coastline College, or CCCD. PDI In-Service also assists in pre-approval for all full-time faculty attendees (blanket approval) for salary advancement credits for at OCC, GWC, Coastline College or CCCD workshops. ***PDI does not provide funding for in-service workshops or classes.*** If you wish to apply for funding for an in-service workshop, contact Staff Development. **If you wish to have an in-service workshop for staff or administration only you must apply to Staff Development, not PDI.** PDI grants salary advancement credits for full-time faculty only.

Examples of In-Service Workshops: Student success workshops, SLO workshops, faculty development workshops, college and/or district goals workshops, department meetings/workshops with a singular purpose or specialized focus, grade norming workshops, writing workshops, technology training workshops, career development workshops, teaching workshops, workshops presented by the District, staff, or faculty but off site (such as an organized workshop of faculty to the Getty Museum, etc.)

Attending or Presenting a Workshop; Requesting Pre-Approval for an All Full-Time-Faculty Attendees (Blanket Approval) for Salary Advancement Credits: Complete the In-Service Training Application accessed from *The PDI Handbook* or the OCC Portal and submit it to the PDI In-Service Subcommittee Chair and the PDI Chair, as indicated on the application. *It is the responsibility of the presenter/workshop to provide PDI with a signed workshop attendance sheet, clearly indicating attendees and presenters requesting PDI salary advancement credits. Blank attendance sheets can be found at the PDI In-Service OCC Portal page or in the PDI Handbook. The signed attendance sheet must be forwarded to PDI for attendance/completion verification so that PDI may forward this professional development information to the District. Attendance sheets for workshops that were not PDI pre-approved cannot be accepted for PDI salary advancement credits.*

If You Have Attended a PDI In-Service Pre-Approved Workshop for All Full-Time Faculty Attendees (Blanket Approval): If you are attending or presenting at a workshop that has been pre-approved by PDI, it may be advertised as such. Make sure you sign the attendance verification sheet at the workshop and indicate that you are requesting salary advancement credits. This sheet will be forwarded to PDI for verification of completion and then the District will be notified of your completion.

Credits Granted: PDI grants credits for actual hours (or partial hours) either attending or presenting at in-service workshops (presenters receive double hours to allow for presentation preparation). If you find you need additional hours for academic research and work, you may apply to PDI's Professional Improvement Subcommittee for an independent study project. See the PDI Handbook or contact the PDI Chair for information. **NOTE: You may not receive salary advancement credit if you are receiving college or District funds for attending or presenting at this event. You may not receive Flex credit and PDI credit for the same project.**

Application and Timelines: *All applications must be pre-approved by PDI prior to the initiation of the project.* The application may be found on the PDI In-Service OCC Portal page or in the PDI Handbook. Submit your application during the fall and spring semesters only, at least two weeks prior to the planned activity and no later than May 1 of the spring semester and December 1 of the fall semester. **The Process Steps:** → Applicant submits application → PDI In-Service Subcommittee Reviews Application → Applicant is notified of approval, denial, or revision request

Verification of Completion: If you have attended a PDI-approved workshop or activity, verification of completion is based on your signature on the attendance sheet the day of the workshop; the workshop presenter is responsible for forwarding that attendance sheet to PDI. If you are applying for salary advancement credit effective for a horizontal move on the salary schedule, make sure verification of attendance is submitted to PDI by April 1 of that year.

Standards for Receiving Salary Advancement Credit for In-Service Training

Eighteen (18) hours of workshop attendance = one (1) unit of credit; hours can be accumulated. Faculty presenters may apply for and earn double credit for the workshop time presented. No more than eight (8) units of workshop credit may be counted in any one school year. No more than ten (10) workshop units may be used in moving from one salary schedule column to the next higher column.

Chapter 5: PROFESSIONAL IMPROVEMENT: Full-Time Faculty Only

Salary Advancement Credits: Attendance or presentation at conferences, seminars, and off-District site workshops; independent study and work experience projects.

Academic Unit-for-Unit Credit: Lower division coursework

Funding (Stipend): Independent study, seminars, or work experience

Contact Info: Jeff Brown, Chair: jbrown@occ.cccd.edu or x23070

Professional Improvement Functions and Goals: The Professional Improvement Subcommittee encourages and assists full-time faculty in their professional development goals by offering salary advancement credit or overload pay (in stipends of \$500.00 to \$2000.00) for these professional development activities:

- **Salary Advancement Credits:** Attendance or presentation at conferences, seminars, and off-District-site workshops; doing independent study or work experience projects
- **Academic Unit-for-Unit Credit:** Lower division coursework.
- **Funding (Stipend):** Independent study, seminars, and work experience

Processes and Timelines for Application and Approval: Applications are accepted during the fall and spring semesters only. All applications must be pre-approved prior to the initiation of the project. Below are the timelines, processes, and requirements. Funding is very limited, so apply early:

- ⇒ **Salary Advancement Credit Applications/Timelines:** Submit during the fall or spring semesters, at least two weeks prior to the beginning of the project, but no later than May 1 in the spring semester and December 1 in the fall semester.
- ⇒ **Overload Pay (Stipend) Applications/Timelines (\$500.00 to \$2000.00):** Submit during the fall or spring semesters (Dec. 1 and May 1 are semester deadlines), at least two weeks prior to the beginning of the project and no later than the end of the first week of the spring semester for payment during that same fiscal year. You may submit early for the next fiscal year—the fiscal year runs from July 1-June 30.

Are You Eligible for a Stipend? According to the contract "A faculty member on schedule 'AA' or 'QQ' who is on the last regular step of any column, or on any longevity step of column IV, or on any step of column V, of the salary schedule, and who desires to pursue a program of professional improvement may be compensated by released time or overload pay." **Verification of completion of pre-approved work must be submitted to the Alternative Methods Chair and the PDI Chair no later than May 1 of the fiscal year you applied for in order to be paid.**

IMPORTANT FOR PAYMENT: Submit the verification of your completed project to the Professional Improvement Chair and the PDI Chair no later than May 1 of the fiscal year that you were approved for; if you submit your verification late you may not be paid due to District fiscal timelines.

IMPORTANT FOR HORIZONTAL SALARY COLUMN MOVES: Submit the verification of your completed project to the Professional Improvement Chair and the PDI Chair no later than September 1 in order to make a horizontal move on the Salary Schedule for the school year. Official documentation by PDI is then submitted to the District by September 15.

The Six Professional Improvement Credit Project Options

1. Conferences (salary advancement credit only): Attendance at scheduled sessions of recognized professional organizations for conferences: salary advancement credit only. For conference funding, see the PDI Conference Funding Subcommittee.

Standards for Receiving Conference Salary Advancement Credits

Eighteen (18) hours = one (1) salary advancement credit. No more than eight (8) conference salary advancement credits in one school year. No more than ten (10) conference salary advancement credits to move from one salary column to the next.

2. Independent Study: This program enables a faculty member to develop an independent study project that may not fit into another PDI project definition but that will also increase teaching effectiveness. An explanation of how this experience/study will increase the faculty member's teaching effectiveness, how the work will be done and completed, time spent on the project, who will evaluate the work for its completeness, and what evidence will be presented that the objectives have been met must all be submitted with the application: salary advancement credits or overload pay (stipend) only.

Standards for Receiving Independent Study Salary Advancement Credits or Overload Pay (Stipend)

Salary Advancement Credits: Eighteen (18) hours = one (1) salary advancement credit. No more than eight (8) independent study salary advancement credits in one school year. No more than ten (10) independent study salary advancement credits to more from one salary column to the next.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

3. Lower Division Coursework (academic unit-for-unit credit only): * For lower division coursework taken that will earn a C or higher or a pass/credit (no audited courses), applicant should provide full justification that the work enhances subject matter knowledge in the faculty member's teaching field(s) or newly evolved teaching fields(s), or how it relates to evolving teaching methodology and/or technology: unit-for-unit academic credits only.

***Note about upper division/graduate coursework:** It is not necessary for full-time faculty to apply to PDI for approval for *upper* division coursework, since the district accepts this work as academic units. **As per the CFE Contract:** "Horizontal salary credit for upper division units, graduate units, continuing education units, or professional education units course work will be accepted only from accredited institutions." However, PDI advises full-time faculty to contact the District *before* taking a class to ensure its eligibility. Contact Kyla Bentley (kbentley3@cccd.edu or 714-438-4719). Submit verification of upper division/graduate coursework to Kyla Bentley at kbentley3@cccd.edu at the District Office prior to September 15.

Standards for Receiving Lower Division Coursework Unit-for-Unit Academic Credit

Unit-for-unit academic credits only—for example, a PDI pre-approved lower division course of 3 credits would be granted 3 academic credits upon successful completion: a course grade of "C" or better or credit/pass would be needed to receive credit. Transcripts will be requested as proof of completion. Audited courses will not be accepted.

4. Off-District-Site Workshops: Participation via attendance or presentation at scheduled sessions of recognized professional organizations or agencies, such as foundations or research organizations, if sufficient value can be substantiated upon application and review: salary advancement credits or overload pay (stipend)

Standards for Receiving Off-District-Site Workshop Salary Advancement Credits or Overload Pay (Stipend)

Salary Advancement Credits: Eighteen (18) hours = one (1) salary advancement credit. No more than eight (8) off-district-site workshop salary advancement credits in one school year. No more than ten (10) off-district-site workshop salary advancement credits to more from one salary column to the next.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

5. Seminars: Attendance at scheduled sessions of recognized professional organizations or agencies, such as foundations or research organizations, if sufficient value can be substantiated upon application and review: salary advancement credits or overload pay (stipend) only.

Standards for Receiving Seminar Salary Advancement Credits or Overload Pay (Stipend)

Salary Advancement Credits: Eighteen (18) hours = one (1) salary advancement credit. No more than eight (8) seminar salary advancement credits in one school year. No more than ten (10) seminar salary advancement credits to more from one salary column to the next.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend to \$2000.00 for 28 hours (adjusted based on applicant's base annual salary).

6. Work Experience: The work must be directly and adequately supervised by a person with superior knowledge in the field of employment. The firm in which employed must be of such stature that the employment will enable the instructor to grow in knowledge and experience. Work experience credit will NOT be granted for writing for publications, teaching at any level, employment for duplicating an assignment in the Coast Community College District, work where the applicant is employed and remunerated by the Coast Community College District, work during the applicant's contract year, employment by relatives, self-employment, or employment as an independent contractor. An instructor is eligible to apply for work experience credit after he/she has completed one year of teaching in the Coast Community College District. An instructor may not receive more than eight (8) units of work credit of a repetitious nature during subsequent summers. It shall be the responsibility of the reviewing committee and work supervisor to decide whether or not such work is of a repetitious nature.

**Standards for Receiving Work Experience Salary Advancement Credits or
Overload Pay (Stipend)**

Salary Advancement Credits: Thirty-six (36) hours = one (1) work experience salary advancement credit. Less than eighteen (18) hours will not be considered. No more than eight (8) work experience salary advancement credits may be counted toward salary advancement credit in any one year. No more than ten (10) work experience units may be used in moving from one salary column to the next higher column.

Overload Pay (Stipend): Approximately seven (7) hours for a \$500.00 stipend or fourteen (14) hours for a \$1000.00 stipend, (adjusted based on applicant's base annual salary.)

Chapter 6: PDI APPEALS PROCEDURE: How to Appeal a PDI Decision

Note: The appeals process for sabbatical leave is different—see the Sabbatical section of this handbook.

If an applicant requesting *credit* for independent study, job exchange, job shadowing, work experience, lower division course work, mentoring, new assignment, publications, production of educational materials, professional organization activity, work experience, workshops, seminars, or conferences is denied such credit by PDI *for failure to meet the established criteria for granting approval*, and said applicant desires to appeal the decision, an appeal may be made under the following conditions:

1. *Denial of credit by the College PDI Committee because the applicant failed to meet the requirements for prior approval is not appealable.*
2. Denial of credit by the College PDI Committee because the applicant does not meet any one of the requirements under the criteria for granting approval and/or because insufficient documentation of the completed work is submitted, the appeals process is as follows:

a. **Informal Level**

A complaint may, but need not, result in a formal appeal. Before proceeding with a formal appeal, the faculty member shall attempt to resolve the complaint by an informal conference with the chairperson of the College PDI Committee. The Chairperson shall explain the reasons for denial of approval and suggest ways that the Faculty Member could modify his/her program of professional improvement to meet the established criteria. The Faculty Member who asked for the conference and the chairperson may each have another Faculty Member present.

b. **Formal Level**

Any complaint that is not resolved at the informal level noted above, may be pursued through a formal appeal process in accordance with the procedures:

(1) **Level 1**

- (a) The appellant shall inform the Chairperson of the College PDI in writing within ten (10) working days after the informal meeting that he/she wishes to proceed with a formal appeal and the nature of the appeal.
- (b) The Chairperson will convene the appeal committee within ten (10) working days after the request is received. The Chairperson will chair the committee and serve as a non-voting member. The appeal committee shall consist of four (4) voting members as follows: a faculty member chosen by the appellant, the President of the Academic Senate or his/her designee, and two members of the College PDI appointed by the Chairperson of the College PDI.
- (c) The appeal committee may elect to take one of the following actions: Concur with the findings of the College PDI, find in the appellant's favor, suggest remedies that the appellant could follow to meet the criteria for having the program approved.
- (d) Appeals after September 15 are to take effect the following year for salary advancement credits used towards a column move.

(2) **Level 2**

- (a) If the appellant is not satisfied with the decision of the committee at Level 1, the appellant may appeal to the District IPD/PDI Appeal Committee.
- (b) The District PDI Appeal Committee will be comprised of six (6) voting members, one from each college appointed by the Federation, and one from each college appointed by the District in the event of an appeal. The Federation President, or designee, and the Vice Chancellor for Human Resources, or designee, shall serve as non-voting members.
- (c) The District PDI Appeal Committee will serve as an appeal body with the power to recommend to the Vice Chancellor for Human Resources, in the event of a disagreement between a bargaining unit member and the District with regard to application of the criteria.
- (d) The appeal shall be made in writing to the District PDI Appeal Committee within ten (10) working days after the appellant receives the decision of the College PDI.
- (e) The District PDI Appeal Committee shall issue its decision within twenty (20) working days after receipt of the appeal, or as may be reasonably extended. The decision of the District PDI Appeal Committee shall be final.

Chapter 7: SABBATICAL LEAVE: Full-Time Faculty

Reviews and grants sabbatical leaves.

Contact Info: Sabbatical Leave Subcommittee Chair, Arabian Morgan, amorgan@occ.cccd.edu, x23107



Sabbatical Leave Functions and Goals: Faculty Members will be encouraged to pursue professional growth leading to the development of increased competence and the improvement of instruction and/or redirection in their teaching discipline. The District's sabbatical leave program is designed to assist in these pursuits. Faculty interested in applying for sabbatical leave should review the Contract agreement between the Coast Community College District and

CFE.

Eligibility and Procedures: A regular (full-time) faculty member may apply for a sabbatical leave after six years of consecutive years of service with the District.

Funding: Typically, not all applicants receive funding due to the limited funding allocated. Starting with the 2008-2009 year, the District agreed to budget the sum of \$210,000.00, each year, to be used for sabbatical leaves. Beginning in 2009-2010 and each year thereafter, the funding amount for the prior year will be increased by the percentage salary increase provided to the Faculty [each year]. The annual budgeted amount will be distributed proportionately among the Colleges based on the F.T.E. of full-time faculty members covered by the contract. Each college will be guaranteed at least one sabbatical leave paid by these funds. The annual budgeted amount will be used to augment any salary dollars which can be saved through self-funding. Any unused sabbatical funds shall be carried over to the next year to augment the funding for sabbatical leaves.

Length of Leave: A sabbatical leave may be granted for one semester only; two half semesters; or two separate semesters to be commenced and completed within a three-year period. The service intervening between the two portions of leave taken shall be counted as service toward later sabbatical leave eligibility and shall begin with the beginning of the semester only.

Compensation: A faculty member granted a sabbatical leave for an academic year (two full semesters) shall receive sixty percent (60%) of the faculty member's base salary for that year. A faculty member awarded a sabbatical leave for one semester or two half semesters shall receive full salary for that semester or semesters. The District shall continue to provide insurance benefits during the period of the sabbatical leave. Time on sabbatical leave shall be treated as working time for salary step placement and retirement contributions shall be continued as provided by law. ***Compensation for the sabbatical leave shall be paid upon return of the faculty member*** (in accordance with Education Code provisions) unless the faculty member furnishes a suitable bond indemnifying the District against loss in the event the faculty member fails to render the agreed upon period of service to the District following return from the leave. The faculty member will be reimbursed the cost of the bond upon fulfilling the service requirement.

Faculty Working While on Sabbatical: Faculty members who request and are assigned may work up to a maximum of six and eight tenths (6.8) overload units. Faculty who are on half-semester sabbaticals may not teach overload other than what is required to meet load.

Accident or Illness: Interruption of the sabbatical leave because of serious accident or illness will not be considered failure to fulfill the conditions under which the leave is granted. In the event of serious accident or illness, the Faculty Member will continue to receive compensation as provided in Article XIV of the Contract.

Subsequent Service: A faculty member, as a condition of being granted a sabbatical leave, shall agree in writing to render a portion of service equal to twice the period of the Leave; this service to be served continuously and immediately upon completion of the Sabbatical Leave. If the sabbatical leave is a split sabbatical, the faculty member will be required to render service to the District each semester between the end of the first portion of the sabbatical leave and the beginning of the second portion.

Sabbatical Reports: After the conclusion of the faculty member's sabbatical leave, the faculty member shall submit a written report describing how the sabbatical experience met the goals of the approved proposal and submit that report to the Sabbatical Leave Committee. After review of the report the committee chair will forward the report to the president of

the college for submission to the chancellor and the Board of Trustees. If a report is not submitted within sixty (60) days after returning to duty, a notice shall be sent to the faculty member and the Union, sent by the college president or designee, indicating that if the report is not submitted within fourteen (14) calendar days, it will be deemed a failure to complete a service requirement of the sabbatical and the employee's bond will be forfeited and the employee's timeline clock for a new sabbatical will not be started until the sabbatical report is submitted.

Models of Sabbatical Reports: Models of sabbatical reports may be found on the OCC Portal at the Professional Development Institute site, "Sabbaticals" tab.

Suggested Sabbatical Leave Proposal Study Types (as recommended by the OCC Sabbatical subcommittee)

Study: Six (6) semester units minimum to be taken during the leave period. Upper division or graduate units are best but lower division units are occasionally appropriate. Subject matter should be appropriate for the faculty member's teaching assignment or for retraining for a new assignment

Research: A specific research project in the faculty member's subject matter/job assignment. The subject to be researched should provide the faculty member with information/techniques to take back to the classroom/job assignment. The research can involve a literature search, lab, or field work, questionnaires, or phone surveys, or a combination. Research is also appropriate for retraining for a new assignment

Travel: A minimum of six (6) weeks is recommended during the approved leave period. The information to be collected should be more in depth than that which could be collected by a phone survey. The travel period should include significant time devoted to the research topic

Work Experience: Participation in the faculty member's academic field with a company, organization, or individual, or a combination of any of the above, i.e., travel and research. Preparing to teach a new course in the faculty member's subject area is NOT regarded as appropriate as a sabbatical project

Guidelines for Planning and Preparing Your Proposal

- Present in a simple format.
- Specify what you intend to do (your goals), how it applies to your current and/or future college assignment, and how you intend to accomplish your goals (method and/or procedures).
- Create an abstract stating your goals and how you will accomplish. (This is required if you have a lengthy proposal.)
- Provide supporting documents, as needed for usefulness. Letters you have sent, or will send, making contacts, setting up meetings, etcetera, as well as responses to those letters, indicate advance planning for your leave.
- Provide a note from your division dean if you are redirecting or working on a new course out of your subject area/program (as would be helpful).
- *Pay and Conflict of Interest.* As you are being paid during your leave by the District, it is not to be expected that you receive remuneration for your sabbatical project. For example, it would not be considered appropriate for you to spend your entire sabbatical writing a book for which you expect income in the future. On the other hand, conducting research for a book which includes subject matter relevant to an assignment would be appropriate.

Past Proposals and Models: A number of past proposals are on the OCC Portal at the Professional Development Institute site, "Sabbaticals" tab; the most up-to-date proposals are available from the Sabbatical Chair or the PDI Chair. Consider speaking to a colleague, as well, who recently completed a successful sabbatical.

Sabbatical Leave Ranking Procedure

The Sabbatical Leave Committee shall publish its ranking system based upon these criteria:

I. INCREASED COMPETENCE: Must meet at least two areas to receive a possible 20 points:

- Language/verbal skills
- Practical, hands-on experience
- Computational/statistical
- Sensory perception
- Other factors as identified by the applicant

II. REDIRECTION AND/OR IMPROVEMENT OF INSTRUCTIONAL SERVICES: Must meet at least two areas to receive 20 possible points:

- Language/verbal skills
- Practical, hands-on experience
- Computational/statistical
- Sensory perception
- Other factors as identified by the applicant

III. EXCEPTIONAL OPPORTUNITY: (10 points possible):

- All disciplines shall be considered equal for the purpose of ranking. Anticipated specific experiences should be noted.

IV. LENGTH OF SERVICE (20 points possible):

To be awarded on a sliding scale based on length of service based on seniority.

1. Applicants are to be ranked according to the length of service time since they were first hired as full-time faculty, or by the length of time since their last sabbatical leave, whichever is the most recent. Those with the longest length of service time are to be given rank over those with less time until all applicants are ranked in descending order, beginning with the most service time and ending with the least.
2. The "starting date" is to be defined as the official date of hire, as supplied by the District Personnel Office. "Time since previous sabbatical" is counted as beginning with the semester in which the faculty member returned to her/her teaching position from his/her sabbatical leave. Time occurring between split sabbatical leaves is counted as service time and added to the total length of time since the return from sabbatical and the most recent application being considered.
3. In the event two or more faculty members have the same total length of service time (which may result from the same starting dates, same sabbatical dates, or a combination of these), they are to be ranked by lots drawn in their presence as well as that of the College President (or his/her representative), the President of the Academic Senate, and the Chair of the Sabbatical Leave Committee.
4. Length of service points will be awarded in descending order, e.g., the applicant with the most length of service will be awarded the most possible points and so on down the scale.

The Sabbatical Leave and Its Application Process: Some Sabbatical Documents May Be Submitted Electronically

1. Faculty members who wish to apply for a sabbatical leave must submit all paperwork as per the deadlines in the contract and as reprinted below.
2. The College Sabbatical Leave Committee shall forward to the College President a list containing the names of those faculty members whose sabbatical leave applications have been reviewed indicating those approved for recommendation. Upon request from the College President, a ranking of all sabbatical applicants by score will be provided.
3. The College President, or designee, shall review the recommendations of the college Sabbatical Leave Committee. In the event of a disagreement, the College President, or designee, will confer with the chairperson of the college Sabbatical Leave Committee before making a final decision.
4. The College President will forward to the Vice Chancellor for Human Resources the names of all those persons to be recommended to the Board. The College President, or designee, will have carefully evaluated the costs involved and will recommend the largest possible number of faculty with the dollar limitation, as indicated by the proportional share of the sabbatical leave monies to be received by the college.
5. The Vice Chancellor for Human Resources, or designee, will make final recommendations to the Board in ample time for the Board to consider the recommendations in the month of January for sabbaticals in the following academic year.

Appeals Procedure: If a faculty member desires to appeal his/her ranking, and/or claim a violation of the procedures, he/she will follow the sabbatical appeals procedure outlined in Appendix C of the contract and noted in this handbook.

SABBATICAL LEAVE—DATES TO REMEMBER

Friday of the 2nd Week of Fall Semester: Intent to File due

Friday of the 3rd Week of Fall Semester: Applications due

Friday of the 6th week of Fall Semester: Applications requiring revisions will be returned to applicant.

Friday of the 8th week of Fall Semester: Deadline for submission of revised applications

November 2: Acceptable sabbaticals sent to College President

November 9: President requires ranking, request is made of Sabbatical Leave Committee

November 18: Ranking sent to the College President.

December 1: President sends sabbaticals to the District

January: Board of Trustees approves sabbaticals

By the end of the first week of the spring semester, the Sabbatical Leave Committee shall notify successful candidates.

Appeals Timeline: Appeals on any action must be filed within five (5) working days from the time the applicant received notice of action. See sabbatical appeals procedure for details. **Failure to meet deadlines is not appealable.**

INTENT TO FILE FOR SABBATICAL LEAVE

Faculty members who wish to apply for Sabbatical Leave must submit an Intent to File for Sabbatical Leave form electronically or by hard copy by the end of the second week of the fall semester prior to the year in which the leave will be taken.

NAME: _____ DISCIPLINE: _____
(please print)

I intend to file for Sabbatical Leave. Please forward an information packet to me.

Signature Date

Note to applicant: Please review Article XXI, including Appendix C of the CFE/AFT Contract prior to submitting this form in order to determine eligibility and benefits.

Note to Sabbatical Leave Committee: When the due date falls on Saturday or Sunday, the due date becomes the following Monday.

SABBATICAL LEAVE APPLICATION: Due by the end of the third week of the fall semester.

Submit a copy of your sabbatical leave proposal along with the application form and submit both to the Chairperson of the Sabbatical Leave Committee either electronically or by hard copy.

NAME OF APPLICANT: _____

PROPOSED DATES OF SABBATICAL LEAVE: _____

PURPOSE: The purpose of a Sabbatical Leave is to encourage faculty members to pursue professional growth leading to the development of increased competence and the improvement of instruction and/or redirection in their discipline. Each Sabbatical Leave Committee shall review Sabbatical Leave applications and ascertain if the proposal qualifies in meeting the stated purpose. Unqualified applications will be returned to the applicants with comments for improvement, and applicants will be urged to rewrite and resubmit their proposals. The Sabbatical Leave Committee shall forward to the College President a list containing all of those faculty members whose Sabbatical Leave applications have met the above purpose. Ranking of sabbatical leave applicants will be done only when the amount of funds available for sabbatical Leaves is not sufficient to send every approved applicant. See Appendix C, page 131, of the CFE Contract for ranking procedure.

PROPOSAL EVALUATION PROCESS: A committee of your colleagues will evaluate your sabbatical leave proposal; therefore, it is imperative that it be as complete and clear as possible. Please state as specifically as possible what you are going to do on your sabbatical, how you are going to do it, and what the benefit will be to you.

SALARY ON SABBATICAL (Select One):

- I elect two equal installments following my return from sabbatical.
- I will furnish a bond in order to receive pay while on leave.

LENGTH/SEMESTER(S) OF LEAVE FOR SABBATICAL:

- One full semester
- Two half-semester, split over one continuing year
- Two full semesters taken over the course of one continuing year
- Two full semesters, split over the course of three years

Please indicate specifically and in writing on the line below, which semester(s) you are requesting for your sabbatical leave:

Upon completion of the leave and within sixty (60) calendar days after a return to duty, a written report must be submitted to the College President for transmittal to the Chancellor and the Board of Trustees. I understand if I do not submit a report, I will forfeit my bond, and my timeline clock for a new sabbatical will not be started until the sabbatical report is submitted.

As a condition of being granted a Sabbatical Leave, I agree to render a portion of service to the Coast Community College District equal to twice the period of the leave.

SIGNATURE DATE

The Sabbatical Leave Appeals Procedure

Should ranking become necessary, each applicant will receive a copy of his/her ranking sheet(s) providing applicant with his/her score on each criteria and his/her place in rank. A roster of ranking is available from the Academic Senate Office.

1. If sabbatical leaves are ranked because the amount of money available is not sufficient to send every approved applicant on leave and an applicant desires to appeal his/her ranking, and/or an applicant claims a violation of procedures, the appeals process is as follows:
 - a. **Informal Level:** A complaint may, but need not, result in a formal appeal. Before proceeding with a formal appeal, the faculty member shall attempt to resolve the complaint by an informal conference with the Chair of the Sabbatical Leave Committee. The Chair shall explain the process used in arriving at the rating of the proposal submitted by the appellant. The faculty member, who has asked for the conference, and the Chair, may each have another faculty member present.
 - b. **Formal Level:** Any complaint that is not resolved at the informal level may be pursued through a formal appeal process in accordance with the following procedures:

Level 1

The appellant shall inform the Chair of the Sabbatical Leave Committee in writing ten (10) working days after the informal meeting that he/she wishes to proceed with a formal appeal and the nature of the appeal.

The chairperson will convene the Appeals Committee within five (5) working days after the request is received. The chairperson will chair the Appeal Committee and serve as a non-voting member. The Appeal Committee shall consist of four (4) voting members as follows: a faculty member chosen by the appellant, the chairperson of the Academic Senate or his/her designee, and two (2) members of the College Sabbatical Leave Committee—one who ranked the appellant's proposal the lowest for merit. (In the event several persons gave the proposal identical high or low rankings for merit or all persons gave the proposal the same rankings for merit, the chairperson of the College Sabbatical Leave Committee shall select the two [2] members to serve from the appropriate group[s].)

The appeal committee may elect to take one of the following actions: (1) agree with College Sabbatical Leave Committee's recommendation; (2) reconsider application by reviewing application for the purpose of computing new ranking score; and (3) make a specific recommendation to remedy violation of procedure.

NOTE: If an appeal that results in a proposal being evaluated at a higher score and if the new score is higher than the score of any faculty member who has been granted a sabbatical, the proposal will be forwarded to the College President with the recommendation for funding. If the proposal cannot be funded, that proposal will be given first priority for the next year. If several appeals qualify because the appeals committee grants them higher scores and the proposals cannot be funded, the proposals shall be given rank order on their new scores and that order shall have precedence over new or resubmitted proposals for the next year.

Under no circumstances will an appeal on merit replace a funded sabbatical leave.

Chapter 8: DISTRICT VERIFICATION OF CREDITS EARNED

Contact Info: Kyla Bentley (kbentley3@ccd.edu or 714-438-4719)



District Verification of Credits Earned: If PDI has verified the completion of your PDI project and/or you would like to know the that the credits were recorded by the District, or if you would simply like an up-to-date list of your salary advancement and academic credits, contact Kyla Bentley at kbentley3@ccd.edu or 714-438-4719 in District Personnel.