



**THE CALIFORNIA STATE UNIVERSITY**  
**Office of the Chancellor**  
**401 Golden Shore**  
**Long Beach, California 90802-4210**  
**(562) 951-4425**

**Date:** May 6, 2005 **Code: TECHNICAL LETTER**  
**HR/Salary 2005-08**

**To:** Associate Vice Presidents/Deans of Faculty Supersedes HR/Salary 2004-14  
Human Resources Directors  
Payroll Managers

**From:** Cathy Robinson  Cordelia Ontiveros   
Assistant Vice Chancellor Senior Director  
Human Resources Administration Academic Human Resources

**Subject:** **Faculty (Unit 3) Salary Administration During State-Supported Summer Sessions at Semester Campuses for Summers 2001, 2002, 2003, and 2005**

We are writing to provide updated information on Faculty (Unit 3) salary administration for state-supported summer sessions for summers 2001, 2002, 2003 and 2005 offered by California State University (CSU) campuses using a semester system, including CSU Stanislaus, consistent with an arbitration decision and recent Memoranda of Understanding (MOUs) between the CSU and the California Faculty Association (CFA). Campuses now are required to review prior salary administration practices to ensure compliance with the MOUs. The MOUs are available on the web at [http://www.calstate.edu/LaborRel/Summer\\_YRO\\_MOU-CFA.shtml](http://www.calstate.edu/LaborRel/Summer_YRO_MOU-CFA.shtml). The MOUs specify which campuses are covered for each year. This memorandum addresses state-supported summer programs only, including fee buy-down campuses. **It does not apply to Summer 2004, and there have been no changes in practice for true self-support summer programs.**

◀ **GENERAL INFORMATION**

- **Salary at Humboldt and Sacramento** - Humboldt State University and CSU Sacramento have separate MOUs governing summer operations. Faculty members who teach for extra pay during a state-supported summer term, in addition to their regular academic year position, may be appointed into the classification codes listed below, as appropriate. The campus must have submitted an approved academic calendar that includes summer term pay periods. Faculty in these classifications

---

**Distribution:**

Vice Chancellor, Human Resources  
Executive Vice Chancellor/Chief Financial Officer  
CSU Presidents  
Vice Presidents, Academic Affairs  
Vice Presidents, Administration

Budget Officers  
Benefit Officers  
Employee Relations Designees  
Director, SOSS

receive twice their usual base pay rate per month, at an appropriate timebase. Summer salaries for these classifications are paid in three equal monthly installments, rather than in six monthly installments as during a regular semester.

- 2158 Lecturer, Summer Term - Casual Employment Employee
- 2160 Instructional Faculty, Summer Term - Casual Employment Employee
- 2282 Department Chair, Summer Term - Casual Employment Employee

- **Salary at Semester Campuses other than Humboldt and Sacramento, including Stanislaus** - Faculty members who teach for extra pay during a state-supported summer term, in addition to their regular academic year position, may be appointed into the classification code listed below. Faculty members in this classification are paid on a per unit basis. The rate per unit is calculated by dividing the faculty member's academic year full-time annual salary by 30 (30 units represents full-time for one academic year at a semester campus): Summer Salary Rate Per Unit = (AY Full-time Salary)/(30).

- 2357 Instructional Faculty, Summer Session Casual Employment Employee

- **Faculty Who Teach Only in the Summer** - Faculty who teach only in the summer do not have an academic year salary upon which to base their summer salary. Therefore, these faculty may be appointed at any appropriate salary level within classification code 2357. Also, per provisions 1.3, 1.5, and 21.2 of the Faculty Collective Bargaining Agreement (CBA), employees whose sole Unit 3 employment for that academic year is in classification code 2357 are excluded from the bargaining unit. *These employees are not covered by the terms of the CBA and are excluded from the summer MOUs.*

- **State-supported Summer Term as Part of Academic Year** - In order for a campus to appoint a faculty member to teach in the summer as part of the regular academic year assignment, either (1) the campus must have a negotiated agreement between the CSU and the CFA that allows faculty to spread the academic year workload over the academic year plus the summer (currently allowed only at Humboldt State University and CSU Sacramento) **OR** (2) the campus must submit an academic calendar that includes a summer term that meets the CSU definitions to be equivalent to a regular semester. No extra salary is paid, and no additional benefits accrue. Regular academic year salary is paid in twelve equal monthly installments, in accordance with the approved campus academic calendar. Sick leave and other leave programs are available during the faculty member's academic year appointment.

#### ◀ **ACTIONS REQUIRED**

- Campuses need to review the MOU on Summer 2005 Staffing and Compensation for semester campuses for guidance on summer 2005 operations.

- Campuses need to review the MOU on implementation of the arbitrator's remedy for year-round operations at CSU **semester** campuses, to determine appropriate corrective actions for summers 2001, 2002 and/or 2003. The application of this MOU will be to faculty who were employed during fall 2004 or spring 2005.
- Campuses need to refer to the following information for guidance on corrective action for 2001, 2002 and/or 2003, and prospective action for 2005, as appropriate.

◆ **1/30<sup>th</sup> PAY ADJUSTMENTS**

Campuses need to determine on a case-by-case basis, referencing information provided in this memorandum, whether any faculty member who was employed at their campus in fall 2004 and/or spring 2005 requires pay adjustments for work assigned in summers 2001, 2002, or 2003. The formula for determining the pay adjustment amount for each applicable summer is as follows:

$$(\$ \text{ Due}) = [(1/30) * (\text{FT AY Salary}) * (\text{Summer WTUS Assigned})] - [\$ \text{ Already Paid}]$$

*These pay adjustments apply only to tenure track and temporary faculty who taught at least one semester in the academic year prior to the 2001, 2002 and/or 2003 summer and who were employed at the campus during fall 2004 and/or spring 2005.* If the faculty member was not employed in the spring semester immediately prior to the summer, the campus is to use the salary from the immediately prior fall semester. Summer WTUs are calculated in the same manner as in the most recent fall or spring semester before the summer in question.

**For current tenured and probationary faculty and full-time lecturers**, these pay adjustments are provided as one-time lump sum payments and no retroactive adjustments to the original PIMS transactions are required regardless of appointment type in prior summers. Processing instructions for these faculty are provided in ATTACHMENT A: Summer Memoranda of Understanding: I – Summer 1/30 Payments, Lump Sum Payment for Tenured, Probationary, and Full-time Lecturers.

**For current part-time lecturers**, these pay adjustments are applied retroactively, which will require a correction of the original PIMS transaction. Processing instructions for these part-time lecturers are provided in ATTACHMENT A: Summer Memoranda of Understanding: II – Summer 1/30 Payments, Retroactive Corrections for Part-time Lecturers.

**Special Funding Note:** For part-time lecturers, approval has been granted to pay from current fiscal year funds any retroactive salary adjustments resulting from the 1/30<sup>th</sup> pay adjustment that exceed a three-year period. Retroactive salary

adjustments for less than 3 years will be charged to the appropriate fiscal year. Lump sum payments will be paid from current year funds.

**Important Dates:** CSU campuses required to make 1/30<sup>th</sup> pay adjustments, except San Jose State University, CSU Northridge and CSU Fullerton, must make payments to eligible faculty no later than June 30, 2005. San Jose State University, CSU Northridge and CSU Fullerton shall make a good faith effort to ensure payments are made no later than June 30, 2005, but in any event must make sure payments are made no later than September 30, 2005.

◆ **PAYMENTS FOR INDIRECT INSTRUCTION**

**Summer 2005** – Tenured and Probationary faculty employed at the campus in fall 2004 and/or spring 2005 and who are appointed for extra pay in the summer, who do not have an appointment that includes payment for indirect instructional duties, are to receive payment for indirect instruction as a one-time lump sum payment of \$100 per WTU of direct instruction assigned for summer 2005.

**Summers 2001, 2002, and 2003** – Tenured and Probationary faculty employed at the campus in fall 2004 and/or spring 2005 and who were appointed for extra pay in Summer 2001, 2002, or 2003 who can demonstrate they performed indirect instructional duties as a result of their summer appointment are to receive a one-time lump sum payment of \$100 per WTU of direct instruction assigned for each applicable summer. Campuses must establish procedures and criteria and notify faculty members by no later than May 30, 2005, of their potential eligibility for this payment. We have provided a letter in ATTACHMENT B that campuses are to use to notify faculty of the potential indirect instructional duty payment.

Processing instructions for payment of indirect instruction for covered summers are provided in ATTACHMENT A: Summer Memoranda of Understanding: III – Indirect Instructional Payment.

**Important Dates:** CSU campuses who need to make payments for indirect instruction for summers 2001, 2002, and/or 2003, except San Jose State University, CSU Northridge and CSU Fullerton, must make payments to eligible faculty no later than July 30, 2005. San Jose State University, CSU Northridge and CSU Fullerton shall make a good faith effort to make payments no later than July 30, 2005, but in any event shall make payments to all eligible faculty no later than September 30, 2005.

◆ **SERVICE SALARY INCREASES (SSIS) FOR LECTURERS**

**Summers 2001, 2002, 2003 and 2005** – WTUs assigned to temporary faculty in state-supported summer programs during 2001, 2002, 2003, and 2005 count towards units required for SSI eligibility under provision 12.10. Temporary

faculty are to receive WTU credit towards SSI eligibility, if such credit was not already provided.

**Lump Sum Payments and Base Pay Adjustments** – Campuses need to review records of temporary faculty employed at the campus in fall 2004 and/or spring 2005 and who did not receive WTU credit towards SSI eligibility during the applicable 2001, 2002 and/or 2003 summers. Campuses must recalculate the employee's SSI eligibility from the summer term forward, calculate the total SSI payment due, if any, and process the payment as a lump sum. Adjustments to the employee's Base Pay are to be made on a prospective basis only.

Processing instructions for both the lump sum payment calculation and the base pay adjustment are provided in ATTACHMENT A:

Summer Memoranda of Understanding: IV – SSI Lump Sum Payment and  
Summer Memoranda of Understanding: V – SSI Base Pay Adjustment.

**Important Dates:** CSU campuses who need to make SSI payments, except San Jose State University, CSU Northridge and CSU Fullerton, must make payments to eligible faculty no later than June 30, 2005. San Jose State University, CSU Northridge and CSU Fullerton shall make a good faith effort to make payments no later than June 30, 2005, but in any event shall make payments to all eligible faculty no later than September 30, 2005. The base pay, and anniversary date, if applicable, and SSI counter for affected faculty shall be adjusted prospectively by no later than the June 2005 payroll period.

This memorandum also is available on Human Resources Administration's Web site at: <http://www.calstate.edu/HRAdm/memos.shtml>. Questions may be directed to Academic Human Resources at (562) 951-4503.

CO/CR

<b>PROCESSING INSTRUCTIONS</b>
--------------------------------

**SUMMER MEMORANDA OF UNDERSTANDING**

**I – Summer “1/30” Payments: Lump Sum Payment for Tenured, Probationary, and Full-time Lecturers**

<b>PIP PROCESSING INFORMATION:</b>	
Processing Responsibility:	<ul style="list-style-type: none"> <li>The campuses are responsible for keying lump sum payment for active employees.</li> <li>The campuses will submit 674 documents to State Controller’s Office PPSD to process all others.</li> </ul>
Processing Date(s):	<ul style="list-style-type: none"> <li>Campus should process no later than the June 2005 pay period.</li> <li>674 documents must be to Mary-Anne Reed in PPSD no later than <b>June 17, 2005</b>.</li> </ul>
Earnings ID:	SB – Retirement eligible GV – Not retirement eligible
Amount:	Varies by employee
Subject to Retirement Withholdings:	SB - Yes GV – No
Taxable/Reportable:	Yes
Subject to Medicare/Social Security	Yes
Included in Calculation for Overtime:	N/A
Included in the Calculation for NDI/IDL Payments:	No
Earnings Statement Description:	CSU LMP SUM
Additional Information:	<ul style="list-style-type: none"> <li>Payments should be made using the employee’s current faculty appointment for the pay period when the payment is issued.</li> <li>Campuses must look at the summer term being adjusted to determine if the employee was eligible for retirement withholding and use the correct Earnings ID.</li> <li>Lump sum payments vary by employee. Campuses are responsible for calculating the amount.</li> </ul>

<b>PROCESSING INSTRUCTIONS</b>
--------------------------------

**SUMMER MEMORANDA OF UNDERSTANDING**

**II. Summer “1/30” Payments: Retroactive Corrections for Part-time Lecturers**

<b>PAY SCALES IMPACT:</b>	
Change Summary:	N/A
Class Code(s):	N/A
CBID:	N/A
Pay Scales Effective Date:	N/A
Date in Production:	N/A
Pay Letter:	N/A

<b>EMPLOYMENT HISTORY (EH)/PAYROLL IMPACT:</b>	
Processing Responsibility:	Campuses
Processing Date(s):	Campus should process no later than June 30, 2005.
Effective Date:	Appropriate summer term
PIMS Transaction:	A54 correct (A54C)
Detailed Transaction Code (Item 719)	N/A
EH Remarks (Item 215)	HR/Salary 2005-08
Pay Amount:	Varies by employee
Pay Form:	Pay rate change
Lump Sum Earnings ID:	N/A
Employees on Leave: Temporary Appointees:	N/A
Additional Information:	<ul style="list-style-type: none"> <li>• Correct the original rate of pay per the 1/30 calculation.</li> <li>• If the total amount exceeds the range maximum, process the overage as a new A54 effective during the summer term.</li> <li>• A listing of all A54C must be submitted to Mary-Anne Reed at SCO Audits so PPSD can verify that all payments processed.</li> </ul>
SCO Personnel Letter:	N/A

<b>COMMON MANAGEMENT SYSTEM (CMS) INSTRUCTIONS:</b>	
Pay Scales Impact:	N/A
GSI/SSI Load Impact:	N/A
CMS Action/Reason:	Campus determined

<b>PROCESSING INSTRUCTIONS</b>
--------------------------------

**SUMMER MEMORANDA OF UNDERSTANDING**

**III – Indirect Instructional Payment**

<b>PIP PROCESSING INFORMATION:</b>	
Processing Responsibility:	<ul style="list-style-type: none"> <li>• The campuses are responsible for keying lump sum payments for active employees.</li> <li>• The campuses will submit 674 documents to State Controller’s Office PPSD to process all others.</li> </ul>
Processing Date(s):	<ul style="list-style-type: none"> <li>• Campuses should process no later than the July 2005 pay period.</li> <li>• 674 documents must be to Mary-Anne Reed in PPSD no later than <b>July 15, 2005</b>.</li> </ul>
Earnings ID:	GW
Amount:	Varies by employee
Subject to Retirement Withholdings:	No
Taxable/Reportable:	Yes
Subject to Medicare/Social Security	Yes
Included in Calculation for Overtime:	N/A
Included in the Calculation for NDI/IDL Payments:	No
Earnings Statement Description:	INDIRCT INS
Additional Information:	<ul style="list-style-type: none"> <li>• Payments should be made using the employee’s current faculty appointment for the pay period when the payment is issued.</li> <li>• Lump sum payments vary by employee. Campuses are responsible for calculating the amount.</li> </ul>

<b>PROCESSING INSTRUCTIONS</b>
--------------------------------

**SUMMER MEMORANDA OF UNDERSTANDING**

**IV – SSI Lump Sum Payment**

<b>PIP PROCESSING INFORMATION:</b>	
Processing Responsibility:	<ul style="list-style-type: none"> <li>• The campuses are responsible for keying lump sum payments for active employees.</li> <li>• The campuses will submit 674 documents to State Controller’s Office PPSD to process all others.</li> </ul>
Processing Date(s):	<ul style="list-style-type: none"> <li>• Campuses should process no later than the June 2005 pay period.</li> <li>• 674 documents must be to Mary-Anne Reed in PPSD no later than <b>June 17, 2005</b>.</li> </ul>
Earnings ID:	SP
Amount:	Varies by employee
Subject to Retirement Withholdings:	Yes
Taxable/Reportable:	Yes
Subject to Medicare/Social Security	Yes
Included in Calculation for Overtime:	N/A
Included in the Calculation for NDI/IDL Payments:	No
Earnings Statement Description:	CSU LMP SUM
Additional Information:	<ul style="list-style-type: none"> <li>• Payments should be made using the employees’ current faculty appointment for the pay period when the payment is issued.</li> <li>• Lump sum payments vary by employee. Campuses are responsible for calculating the amount.</li> </ul>

<b>PROCESSING INSTRUCTIONS</b>
--------------------------------

**SUMMER MEMORANDA OF UNDERSTANDING**

**V. SSI Base Pay Adjustment**

<b>PAY SCALES IMPACT:</b>	
Change Summary:	N/A
Class Code(s):	N/A
CBID:	N/A
Pay Scales Effective Date:	N/A
Date in Production:	N/A
Pay Letter:	N/A

<b>EMPLOYMENT HISTORY (EH)/PAYROLL IMPACT:</b>	
Processing Responsibility:	Campuses
Processing Date(s):	Campus should process no later than June 30, 2005.
Effective Date:	Prospectively at the beginning of the pay period
PIMS Transaction:	MSA
Detailed Transaction Code (Item 719)	N/A
EH Remarks (Item 215)	HR/Salary 2005-08
Pay Amount:	Varies by employee
Pay Form:	Base pay adjustment
Lump Sum Earnings ID:	N/A
Employees on Leave: Temporary Appointees:	<ul style="list-style-type: none"> <li>• Process the increase for those employees on NDI supplemented with Catastrophic Leave (S49 Transact, Item 957 = 40).</li> <li>• Increases for other employees on leave or other non-pay status are to be keyed by the campuses effective the date the employee returns to pay status.</li> <li>• If the temporary assignment has ended, process the MSA effective the same day as the returning appointment.</li> </ul>
Additional Information:	<ul style="list-style-type: none"> <li>• Adjust anniversary date, final anniversary date, and SSI counter if maintained as appropriate.</li> </ul>
SCO Personnel Letter:	N/A

<b>COMMON MANAGEMENT SYSTEM (CMS) INSTRUCTIONS:</b>	
Pay Scales Impact:	N/A
GSI/SSI Load Impact:	N/A
CMS Action/Reason:	Campus determined

**TECHNICAL LETTER**  
**HR/Salary 2005-08**  
**ATTACHMENT B**

As a result of the arbitration decision in the systemwide grievance (CSU #3-02-076) concerning Year-Round Operations, the University and the CFA have agreed to compensate those tenured and probationary faculty who taught in state-supported YRO Summer sessions at your campus in 2001, 2002 and 2003 [**may modify date depending on campus**] for indirect instructional activities performed as a result of Summer YRO employment, subject to certain conditions. The Summer 2001, 2002, and 2003 Memorandum of Understanding is available on the web at [http://www.calstate.edu/LaborRel/Summer\\_2001-2002-2003\\_MOU.pdf](http://www.calstate.edu/LaborRel/Summer_2001-2002-2003_MOU.pdf).

Specifically, those tenured and probationary faculty who did not receive a specific indirect instructional assignment with compensation in the covered summer terms shall receive an indirect instructional one-time lump sum payment, minus applicable taxes and withholding based on the pay period issued. This payment is not subject to retirement withholding and is in the amount of \$100 per each unit of direct instructional work assigned in the covered summer terms subject to the following conditions:

- a. The faculty member must demonstrate by no later than June 30, 2005, that he/she performed indirect instructional activities during the summer term assignment period, and
- b. The indirect instructional activities would not have occurred without the direct instructional assignment in the summer term, and
- c. The indirect instructional activities shall be defined pursuant to existing campus practices.

If you are a tenured or probationary faculty member who taught during one of the covered YRO sessions noted above and believe you should receive a one-time lump sum payment for indirect instructional activity, please contact [**insert campus contact**] no later than June 30, 2005, and provide reasonable documentation of the indirect instructional work you performed but for which you were not previously compensated. If you do not identify yourself as a potential claimant and provide the requisite documentation that the work was performed, you will waive any future claim for payments for indirect instructional work under the YRO arbitration decision. In the event the University disputes your claim, the question of your eligibility for indirect instructional payments shall be resolved by a procedure mutually agreed to by the CSU and the CFA.