Course Release/Project Compensation Process

Overview of Course Release/Project Compensation:

Purpose: The following process outlines the procedures for project compensation and course release agreements.

Coordination: Entire process will be coordinated by the Academic Affairs Executive Assistant.

Beginning of Process: An idea is generated for an activity/task requiring Full Time or Part-time (FT or PT) faculty participation and generating compensation.

End of Process: Final or phased project completion form is submitted to faculty supervisor or dean. In the case of project compensation, authorization to pay is sent to the Payroll Office.

Definitions:

Managing Office – the Academic Affairs office that will sponsor the project, generate the proposal, monitor the work, and maintain and store project documentation.

Home School – the academic school indicated by the PT or FT faculty member’s location code.

Project Supervisor – the individual tracking work progress, approving time logs (when required) and completing project summary. “External Supervisor” refers to an individual who supervises work external to the faculty’s Home School.

Course Release (CR) – Applies to FT faculty only. Faculty member is released from a number of contact hours within their weekly CBA load. The purpose is to work on other projects or duties outside of their regular duties (teaching and college service). Cost of course release is calculated based on a percentage of the faculty member’s salary (contact CNM Payroll Office for calculation).

Project Compensation (PC) – Applies to PT and FT Faculty – Faculty is given compensation to work on other projects or duties in addition to their normal workload (teaching and, for FT faculty, college service). Project Compensation hours required for successful completion of project are determined by Home School and are paid at the prevailing rate identified in the Full-Time and Part-Time Collective Bargaining Agreements.

• Some PT faculty teach in multiple schools. Project supervisors must communicate with all schools to reach agreement for project/time, etc.
Part-time Faculty – 8 hour or less “Professional Development” Compensation Process – this is usually a one day conference or learnshop. A Project Compensation form is not required for this activity. (See process in Appendix A)

Campus-Wide Committees – Faculty working on campus-wide committees are charged to the Home School, i.e., faculty serving on CCC would be charged to the Home School (the academic school indicated by the PT or FT faculty member’s location code) and would be listed on the Home School’s summary form. The Home School would generate all paper work and maintain school cost accounts for all projects, i.e., CCC, SAAC, Chair Council.

Appendices:
A. Part-time Faculty – 8 hour or less Professional Development Compensation Process
B. Contact Hour Table
C. Full-Time Faculty Workload Appendix

Forms:
A. Course Release Form
B. Project Compensation Form
C. Time Log (only when required)
D. Course Release and Project Compensation (CR & PC) Summary

Process:

Agreement and Form Generation

1. An idea for a project is generated by faculty, dean, supervisor, grant entity, or other funding source at the college.

2. The idea is discussed with the Managing Office administration to include the dean. Funding entities other than the Managing Office must receive permission from the appropriate dean to proceed with documentation.
   - Decisions should include: objectives, deliverables, estimated dates of work and names of recommended faculty for project, and type of compensation provided (course release or project compensation).

3. Once agreements have been reached, the managing office staff generates a CR/PC Summary which is then presented by the dean to the VPAA for approval.

4. After approval from the VPAA is obtained, the Project Supervisor or Managing Office staff generates a CR/PC form using information provided by project
supervisor, dean or designee. Managing Office completes remaining information before form can proceed.

Course Release Form to include:
- Academic Term(s)
- Faculty member name and CNM ID (obtain from payroll specialist)
- Project Supervisor name
- Cost Account # (8001 – FT faculty course release)
- Home School of faculty member
- School or Department sponsoring project (Managing Office) – Contract/Grant Title
- Project Title
- Project Start Date and Project End Date
- CBA Weekly Teaching Load (see Faculty Workload Appendix C)

If grant or cost account is outside of faculty’s Home School, include:
  - Total Contact Hours per Term, as calculated from Contact Hours Table (Appendix B)
  - Total Amount ($) – contact Payroll Office for calculation
  - Project Description, Justification and Outcomes/Deliverables

If the project is annual, then the deliverables and amount of course release for each term must be clearly identified.

Project Compensation Form to include:
- Academic Term(s)
- Faculty member name and CNM ID (obtain from payroll specialist)
- Project Supervisor
- Cost Account # (8004 – FT & PT faculty project compensation)
- Home School of faculty member School or Department sponsoring project (Managing Office) – Contract/Grant Title
- Project title
- Project Start Date and Project End Date
- Project Information and Description of Phases and Compensation per Phase (if applicable), Justification and Outcomes/Deliverables
  Include total # of hours to be paid for successful completion of deliverables; the project may be divided into phases to allow payment for completion of components of a deliverable or subsets of multiple deliverables.
- Total $ amount paid at prevailing rate identified in the Full-Time and Part-time Collective Bargaining Agreements
  If project is phased, then the phases and compensation for each phase must be clearly identified.
VPAA Review

5. As soon as can be determined, but no later than eight weeks before the start of term, the deans submit a CR & PC Summary to the VPAA for approval. The summary form should identify both the operational budget and the grant funds being spent on course release and project compensation. The summary form presented prior to the Summer term should include all annual projects that will begin in the following academic year (Fall term start date).

6. CR & PC Summary, showing all planned release and project compensation, is discussed between the dean and the vice-president.
   - The vice-president signs the Summary at the first meeting or, if edits are needed, shortly after edits are complete. Additional documentation, i.e., individual course release and project compensation forms, may be requested by the vice-president.
   - Course releases and project compensation requested after the start of the term and not reflected on the original CR & PC Summary must be submitted and approved before work begins.
   - VP signature on CR & PC Summary Form demonstrates VP approval.
   - Work may begin only after VP signature on CR & PC Summary Form.

7. Managing Office maintains CR & PC Summary accuracy throughout the term and updated CR & PC Summary is posted on the (K:) drive after approval is obtained from the VPAA. Copies are sent to the VP throughout the term.
   - Final CR & PC Summary is posted on the (K:) drive after the first pay period of the next term. The final summary documents changes (additions or deletions) that took place during the term. Original CR & PC Summary remains in the Managing Office.
Signature Collection

8. **Original CR/PC Summary is signed by the VPAA.**
   - The full signature completion process has a *targeted time line* of 15 CNM work days:
     - to circulate the original form past all concerned entities
     - to have the form returned to the Managing Office
     - to notify the faculty member that the form is ready for their signature

9. **Managing Office**
   - Makes a copy of CR/PC Form to remain at the Managing Office during signature collection process
   - Directs CR/PC form to the faculty member

10. **Faculty Member**
    - Signs form within 4 CNM business days of receipt
    - Directs CR/PC Form back to dean of Managing Office

11. **Dean/ Office Director**
    - Signs CR/PC Form within 4 CNM business days of receipt
    - Directs CR/PC Form to Project Supervisor and to Contract/Grant Control Agent, *if appropriate*
      - Form may be directly delivered to Project Supervisor, or the Project Supervisor is notified that they are to report to the Managing Office to sign the form

12. **Project Supervisor (and Contract/Grant Control Agent, if appropriate)**
    - Signs form within 4 CNM business days of notification
    - Directs form back to Managing Office
Form Distribution

Once all signatures have been obtained:

13. **Managing Office:**
- Scans original to CNM (K:) drive entitled Course Release/Project Compensation.
- Upon completion, places hard copy in Managing Office binder.
- Sends copies (electronically or hard copy) to Grant managers or other entities.
- The Payroll Office obtains Course Release/Project Compensation summaries from the (K:) drive.

14. **Payroll Office**
- Obtain electronic copies of CR & PC Summaries from (K:) drive.
  - CR & PC Summary should include: employee name and ID number, cost account, weekly CBA load, weekly contact hours released and total contact hours released.
  - Summary form should be received from schools/offices within first two weeks of term.
- Review CR & PC Summary for cost account changes/grant activity. If cost account change is necessary or if activity is charged to a contract or grant, Payroll Office will access (K:) drive and print agreement from (K:) drive. If a grant cost account is identified as an error Payroll Office will contact Managing Office.
- Payroll Office will:
  - Calculate cost of release and make change in payroll system.
  - File copy of course release or project compensation form for grant work in the contract / grant folder for reference.

Activity Tracked

15. Activity will only be tracked when funding conditions require it. Tracking activity will adhere to funding requirements.
- Untracked projects will be paid upon successful completion of deliverables
- Untracked projects may be paid in phases clearly identified in project proposals
- Course release activity will be paid following the same schedule as payment for a standard course
Closure

16. **Faculty**
   - Completes project or phase of project
   - Delivers project documentation/deliverables, timelogs (if applicable) to Project Supervisor.
   OR
   - Project is terminated:
     - If faculty initiated: Faculty sends email to project supervisor to document termination of agreement.
     - If Project Supervisor initiated: Project Supervisor sends email to faculty to document termination of agreement
     - Copy of email should be filed with cancelled PC/CR.

17. **Project Supervisor**
   - Reviews project completion and deliverables. Obtains through school/office (K:) drive, and completes Project/Phase Completion section of Form (for Project Compensation) or Project Completion section of form (for Course Release). Send updated form to faculty supervisor, dean or office director.
   - Project terminated – complete Project/Phase Completion section of Form (for Project Compensation) or Project Completion section of form (for Course Release) with attached e-mail documentation of project termination; send to faculty supervisor and dean.

18. **Faculty Supervisor, Dean or Office Director**
   - **For Project Compensation:** Reviews Project/Phase Completion section of form and signs authorization to pay portion of form.
     - Sends signed/updated form to Payroll Office to initiate payment for faculty member.
     - Provides copy of updated form to Managing Office.
   - **For Course Release:** Reviews Project Completion section of form.
     - Provides copy of updated form to Managing Office.

19. **Managing Office**
   - Reviews all agreements for completion. Saves electronic copy to (K:) drive.
   - Sends final CR/PC Summary to:
     - VPAA Office
     - Payroll Office
   - The Managing Office is responsible to ensure that payments are processed prior to fiscal year end, July 1st, and prior to the end of the grant. The Payroll Department will generate payment from signed Project/Phase Completion Summary. Project/Phase Completions Summary forms received by payroll deadlines as outlined on the payroll calendar will be paid in the regular biweekly payroll.
• Managing Office will verify accurate payment has occurred from the Payroll Distribution Report.
• Once the project is complete, the Project/Phase Completion Summary with signatures will be uploaded to the (K:) drive.

20. **Records Retention** – Original paper documents are the official documents of record.

**Original Paper Documents**
• Original CR & PC forms will be retained in the faculty personnel file of the Managing Office. Forms include:
  o Copy of completed CR/PC form
  o Time Logs (only when required)
• Managing Office sends personnel file to Records and Property Control Department upon faculty member’s separation from CNM, referencing NM State Record Retention and Disposition Schedules code 1.15.7.101.D.1.
• The Managing Office’s file is retained by the Records and Property Control Department for 3 years from faculty separation.

**Electronic Documents**
• Electronic documents in support of the Project Compensation or Course Release Agreement process will be retained on the Managing Office’s (K:) drive for three years.
• Refer to Records and Property Control Department requirements for disposition of electronic documents.

**End Process**