COMMITTEE GUIDE
PDL and Training/Re-Training Applications

SECTION I – The Committee

PDL COMMITTEE ROLE

- **PDL Applications**
  - Review
  - Assist **revisions/edits**
  - Recommend to the Board
- **PDL Reports**
- **Training/Retraining (T/RT) applications**.

EXPECTATIONS

- PDL committee service is typically a minimum two-year appointment

- Members are <u>expected to attend all meetings</u>;
  - if absent, you will be assigned follow up responsibilities and expected to complete all previously and newly assigned tasks in accordance with committee expectations

- *Confidentiality* – meetings are confidential and information related to applicants/applications is not to be discussed with persons outside the committee.
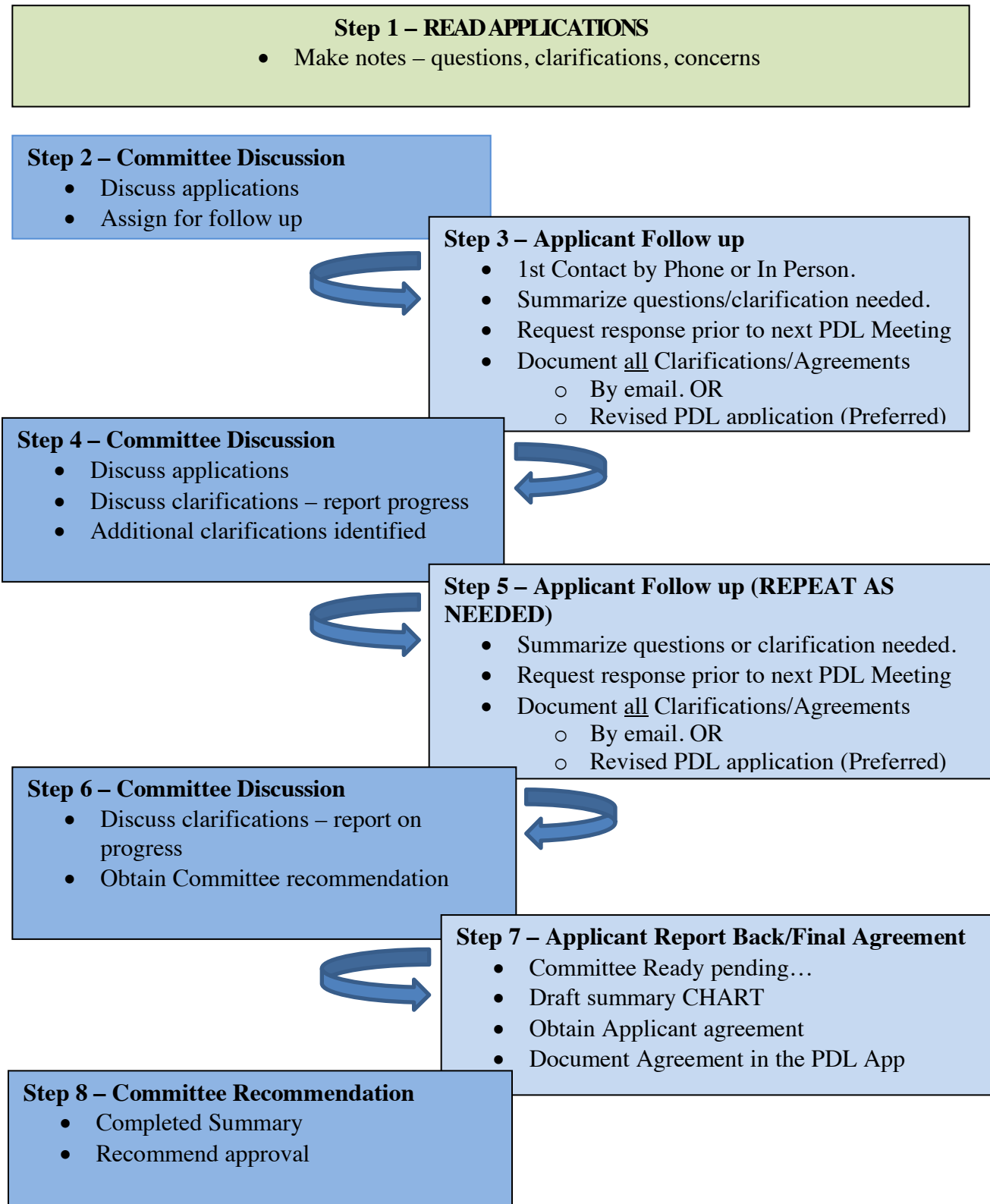
TIMELINE: *Complete by…*

- **PDL Applications**: Fall and Winter Q;
  - Goal: Submit for February Board meeting.
- **PDL Reports**: Any time.
- **T/RT Applications**: April, May.

- TIMELINE:
- Fall Quarter
  - PDL applications.
  - PDL Reports if possible.

- Winter quarter
  - Conclude PDL application review;
  - Review PDL reports.
  - PDL applications to the Board for action
  - Unresolved Applications – notify by end of Winter quarter.

- Spring quarter
  - Review T/RT applications
  - Recommend to Board for action

CONCERNS
- Avoid Dean comments
- Avoid conflict of interest
- Commit to timely communication with applicant
- Commit to follow through

SECTION II – Application Review

Step 1 – READ APPLICATIONS
- Make notes – questions, clarifications, concerns

Step 2 – Committee Discussion
- Discuss applications
- Assign for follow up

Step 3 – Applicant Follow up
- 1st Contact by Phone or In Person.
- Summarize questions/clarification needed.
- Request response prior to next PDL Meeting
- Document all Clarifications/Agreements
  - By email. OR
  - Revised PDL application (Preferred)

Step 4 – Committee Discussion
- Discuss applications
- Discuss clarifications – report progress
- Additional clarifications identified

Step 5 – Applicant Follow up (REPEAT AS NEEDED)
- Summarize questions or clarification needed.
- Request response prior to next PDL Meeting
- Document all Clarifications/Agreements
  - By email. OR
  - Revised PDL application (Preferred)

Step 6 – Committee Discussion
- Discuss clarifications – report on progress
- Obtain Committee recommendation

Step 7 – Applicant Report Back/Final Agreement
- Committee Ready pending…
- Draft summary CHART
- Obtain Applicant agreement
- Document Agreement in the PDL App

Step 8 – Committee Recommendation
- Completed Summary
- Recommend approval

APPLICATION REVIEW

Quarters:
- How many quarters are requested?
- Are they within the 3-year period?

Objectives:
- Can I identify and understand the objectives of the PDL?
- Bullet points preferred.
- Recommend moving any additional narrative to the "Benefits" section.

Activities:
- Understandable?
- Substantial enough?
- Support the objectives?
- **DIFFER FROM PRIMARY DUTIES**?
- Sufficiently detailed and measurable?
- Meet the criteria – Article 17.13?
    - "Substantially benefiting the district and its students; AND
    - Enhance the faculty employee's job performance and professional growth; AND
    - Relate significantly to the faculty employee's profession, assignment or planned assignment."

Verification:
- Include a corresponding verification?
- Each verification tangible?

PDL is *NOT* for **Primary Duties ….**
- Activities for which the faculty employee is receiving regular assignment pay
- Updating his/her own curriculum/classes,
- Creating lesson plans,
- Updating exams, etc.
- Learning online delivery, except for the first time he/she is creating an online course

- Also…
    - PDL *is Not* a vacation
    - PDL *is Not* for Paid Activity Elsewhere

SECTION III – Communicating

STARTING THE CONVERSATION
- As a member of the PDL Committee I have been assigned to contact you for clarification.
- The Committee's goal is to assist you in clarifying any details of your application so that it can be recommended for approval to the Board of Trustees
- The Committee does not make the final decision but rather, it provides a recommendation to the Board.
- The Committee has requested information or clarification on the following (recommend inserting the requested clarification/questions into the Application document and have the employee make changes in the document in Track Changes format)…
  - A
  - B
  - C

CLARIFYING OBJECTIVE(S):
The Purpose for the PDL that will result in enhanced job performance and professional growth.

- Define "objective" vs "activity".
- Objective can't be changed once the application is recommended for approval to the Board itself.
- Offer example(s):
  - OBJECTIVE: improve student learning through existing supplemental materials for [_____topic/area/discipline]..
  - OBJECTIVE: improve student learning through creation of supplemental material/document in [_____topic].

  - OBJECTIVE: expand knowledge/develop expertise in [_____].
  - OBJECTIVE: prepare for/learn [_____].
  - OBJECTIVE: prepare/get training to teach in a new subject area(s) of [_____].
  - OBJECTIVE: improve student learning supplemental materials in [_____ art, website, manual, book, report, course, etc.]
  - OBJECTIVE: learn how to integrate/use new technology/product/teaching strategy
  - OBJECTIVE: identify best practices in [_____ topic].
  - OBJECTIVE: conduct research on [_____ topic].
  - OBJECTIVE: improve effectiveness in the teaching of [_____ topic].

CLARIFYING ACTIVITIES:
The specific action/s that will be completed during each quarter to achieve the objectives.

- Define "activity" vs "objective";
- ALL activities must be done/occur during a PDL quarter; cannot occur outside of quarter.
- **ALL activity changes, *Appendix P2* must be submitted *prior* to the quarter and approved; changes may not be documented after completion of PDL.**
- Must be appropriate substance and duration for each quarter.
- ALL activities must have corresponding verification.
- Clarify exact nature and detail for each activity; see questions below.
- ACTIVITIES SHOULD BE EQUALLY DISTRIBUTED OVER QUARTERS

See ADDENDUM A for examples

CLARIFYING VERIFICATION:
A tangible product/item (hard copy/URL) submitted that confirms an activity has been completed.

To aid in clarifying verification with applicant--
- ask what committee should expect to see/get for each activity as verification
- offer relevant example(s) of typical verification items expected by committee:

See ADDENDUM A for examples

SECTION IV – Documenting the Agreed Upon Plan
(A Summary of the Agreed Upon activities and verification is required. This is helpful to avoid confusion or concerns 4 years later upon submission of the PDL report.)

RECOMMENDING APPROVAL TO THE COMMITTEE
A PDL application must meet the approval of the committee prior to being referred to the Board for approval. Included in this recommendation, and using the P1 Application, should be a clear summary of the objective/s, activities and verifications, by quarter, that are easy to read and follow, and that have been agreed to by the applicant.

- List objective/s
- List activities including detail such as units, hours of work, countries visited, number of books read and reviewed, courses developed, etc. ***Include the list of courses or activities to choose from when applicable***.
- List verifications – what will be submitted including length, before/after, official transcripts, signed verifications and from whom, etc.
- Verify/obtain agreement from applicant.
- Submit to Committee for agreement.

Follow the P1 Application Form

Example 1 **– Summarized from Original Application and 3 Email Clarifications**

Objective:
1) Broaden my areas of knowledge related to women's studies and supporting individuals with disabilities
2) Enhance my ability to teach multicultural counseling.

Description of Activity	Details of Activity	Verification
Quarter 1		
o Average minimum 6 quarter units of courses from the following class selections	See below	Official transcript
Quarter 2		
o Average minimum 6 quarter units of courses from the following class selections	See below	Official transcript
Quarter 3		
o Average minimum 6 quarter units of courses from the following class selections	See below	Official transcript
Courses:		
o Women's Studies Literature	4 Q units University	
o Women in Global Perspective	4 Q units University	
o Gender, Communication and Culture	5 Q units University	
o Women and World Cultures	3 Sem units SJSU	
o Psych of Women	2 Q units De Anza	
o History of Women in Art	4.5 Sem Units UCSC	
o Disabilities	4 Q units University	
o Learning Disabilities	4 Q units University	
o Teaching Students w Disabilities	3 Sem Units Univ of Phoenix	
o Accommodations for Stu w Disabilities	3 Sem units UDSF	

**Example 2** – **Summarized from Original Application and 6 Email Clarifications**

Objectives:
- Make data driven curricular changes and develop appropriate assessments that start with student perspective.
- Provide faculty development opportunities to other biology faculty
- Change the methodologies employed in my current classes for Bio11A to reflect data collected from students.

Description of Activity	Details of Activity	Verification
Quarter 1		
o Research collaboration with Dr. [NAME] of SFSU – review of own survey and course data to determine which areas of curricula are in need of changing. Review of Dr. [NAME] surveys and data from CCB FEST/BFEST (*UNPAID*) o	▪ 2 days (16 hours) per week to analyze data and review published scientific literature ▪ Develop X number of appropriate assessments ▪ Draft first two chapters of report – literature review, methods	▪ Signed verification of log of time/activities with Dr. [NAME] – minimum 16 hours/week Q1/Q2 ▪ Assessments = X number
Quarter 2		
o Complete research from quarter 1. o Prepare workshop to be scheduled in conjunction with CCB FEST project	▪ 2 days (16 hours) per week to analyze data and review published scientific literature ▪ Development of X number of appropriate assessments ▪ Prepare workshop-CCB FEST	• Signed verification of log of time/activities with Dr. [NAME] – minimum 16 hours/week Q1/Q2 • Detailed report (mini-thesis) including literature review, methods, results, conclusions, application of findings, and references – 15 pages minimum not including references. • Assessments = X number • Workshop PPT or other medium for CCB FEST- 25 slides minimum
Quarter 3		
o Reconstruct/convert current Bio 11A class to reflect conclusions of research collaboration and best practices for student centered learning	▪ 13 lecture topics/20 chapters will be revised to reflect new student centered learning conclusions. ▪ Estimate 10-12 hours per revision/restructuring	• Before and after/revised Bio 11A course – online or print version demonstrating application of conclusions from research and where changes were made

ADDENDUM A – APPLICATION CLARIFICATION QUESTIONS

TYPES OF ACTIVITIES   VERIFICATIONS

Type of activity	Clarification Questions	Verification Options
enroll in course	when is course offered (verify during a PDL quarter) what is number of and type of units (quarter/semester/CEU) what if course cancels Must be new information learned/new courses (no repeats). May repeat if taken long ago (>10 years?) upper level in discipline area lower level if new discipline	Official unopened (or certified electronic) transcript showing successful completion (passed with grade "C" or higher). auditing not approved. MOOCs, CEUs, etc., require alternative verification – include registration info or certificate to verify hours of participation.
enroll in course (new strategies)	lower level acceptable if purpose to learn new teaching strategies (different verification)	report of teaching strategies learned and how will be applied auditing approved if for new strategies; will require report official transcript of successful completion
internship	what is nature of work/relevance to objective how many hours per week/quarter; how will hours be verified is work compensated in any way (work may NOT be compensated)	signed letter from the organizational representative verifying total number of work hours and non-paid status
interview/survey	how many participants/sources how many questions; what is expected minimum survey questions or sample questions how will results be used/applied is this "research" needing IRB approval will the faculty employee have control over access	final questionnaire/survey, survey responses and/or notes from interviews, rubric used for analysis summary of analysis conducted summary report of conclusions and how information will be applied
literature review	how many books/sources estimated number of pages/content to be created for report what information on books/sources be will be included how will results be used/applied	Report including: 1) list of publications/resources reviewed; 2) rubric used for analysis; 3) analysis of literature; 4) conclusions; and 5) application of results back to teaching and the college and students. OR Annotated bibliography including: 1) citation; 2) summary of resource; 3) summary of relevant and findings; and 4) applicability to teaching, the college, student learning, or student support.
new course – committee ready	does the faculty member understand and agree to the expectation for "(curriculum) committee ready" course proposal? Differs from "Instructor ready" curriculum. Course proposal should include all fields as required by the college at a minimum to include: 1) Introduction, including number of credits, intro paragraph, course justification, Student Learning Objectives; 2) Course Objectives; 3) Essential Student Materials; 4)	new course summary ready for curriculum committee review. Differs from "Instructor ready" curriculum Course proposal should include all fields as required by the college curriculum committee, at a minimum to include: 1) Introduction, including number of credits, intro paragraph, course justification, Student Learning Objectives; 2) Course Objectives; 3) Essential Student Materials;

	Essential College Facilities; 5) Expanded Description: Content and Form (detailed); 6) Assignments; 7) Methods of Instruction; 8) Methods of Evaluating Objectives; and 9) Texts and Supporting References.	4) Essential College Facilities; 5) Expanded Description: Content and Form (detailed); 6) Assignments; 7) Methods of Instruction; 8) Methods of Evaluating Objectives; and 9) Texts and Supporting References.
new course – instructor ready	does the faculty member understand and agree to the expectation for "Instructor ready" course proposal? Differs from "committee ready" curriculum. Course proposal should include, at a minimum to include: 1) syllabus; 2) schedule; 3) assessments; 4) content; 5) lectures/labs; 6) support materials; 7) readings; and etc. May also require a committee ready proposal if course not already approved.	new course ready for an instructor to be prepared to teach the course. Verification shall include, at a minimum: 1) syllabus; 2) schedule; 3) assessments; 4) content; 5) lectures/labs; 6) support materials; 7) readings; etc. May also require committee ready new course verification if course not already approved.
new document/ publication	what is anticipated length (number of pages); how much is original content what are chapters/topics covered ; show draft Table of Contents	final product – book, resource manual, lab manual, white paper
new product or resource	what is nature/description of product (what will it look like/do) how much effort per week/quarter is required for development what actions must be taken to develop the new product what is expected duration of each activity	new product, book, resource manual, play, music, etc. website before and after new video teaching modules may be hard copy or URL pictures or video of art works
revise/update supplemental document/s or resources	what materials will be changed what is nature of changes (what needs updating) how many chapters/pages will be revised how much will be original content created during the PDL leave periods	before & after documents, website, etc. revised document /URL with changes noted
self-study	what is plan of study what specific resources, materials, etc., will be studied how will results be used/applied (what is end product)	report – see bibliography or literature review for expectations product or URL where product is located log of hours (only allowed in rare situations);
teacher guide	Length of guide; what teachers will have access; how will access be granted/given;	includes rationale, sample assessments; grading rubric and sample answers, guidelines on how to use the guide; instructions; exercises; materials needed; equipment needed; facility needs.
volunteer time	how many hours per week/quarter; how will time be verified; who will sign off verification	signed letter from the organizational representative verifying total number of work hours and non-paid status
workshop/conference	when is workshop/conference offered (verify during a planned PDL quarter) how many days and how many hours per day (or total hours) does conference support an objective?	program, receipts, and and brief write up (2-3 paragraphs) summarizing each topic attended and how to apply information gained from the session.

Addendum B – Standards for Measuring, Clarifying, and Verifying Activities

Measuring Activities

- Credit courses – for a full year of PDL
  - Quarter units = 18 units
  - Semester units = 12 units
- CEUs (Continuing Education Unit)
  - 10 contact hours (of instruction, seminar F2F, etc) = I CEU
  - 18 contact hours = 1 Q Unit
- Hours of Instruction
  - 18 Instructional Contact Hours = 1 quarter unit
- Conference Participation
  - 18 hours of participation = 1 quarter unit
  - Conference day = 6 hours (unless documented otherwise)
- MOOCs
  - 18 Hours – 1 Quarter Unit
  - Use Certificate of Completion, unit conversion (e.g., Fresno), or website info on expected minimum hours.

Coursework

- Clarification – enhancing subject matter expertise
  - What courses does the faculty current teach or has been assigned or would be expected to be assigned.
  - Should be upper level courses, generally, if directly related to current discipline
  - Courses at the same or lower level must demonstrate a new topic or discipline not already studied or taught or within area of expertise – e.g., math instructor taking English or physical science classes okay; English literature instructor taking Lit 1 course NOT okay (see exception below if acquiring new teaching, delivery, or pedagogy skills).
- Verification
  - Official transcript of successful completion
- Clarification – enhancing experience of teaching modalities
  - Courses may be taken at the lower level for the purpose of experiencing/learning other teaching modalities
- Verification
  - Official transcript if taken as enrolled student; OR
  - Log of attendance and signed statement of instructor if observed not as a student participant; AND
  - Report of teaching modality difference, what was learned and how it will be applied.
- Lower Level Courses
  - Generally not allowed unless new information/discipline area.
  - If taking to experience/improve modality, will require transcript and report of what learned and how to apply to courses/benefits students and district

Textbook/Lab Manual Creation (new):

- Clarification:
  - Table of contents/List of chapters
  - Expected length in pages
  - New creation or revision of existing document/publication
- Verification:
  - Completed book in final or near final form (publication not required)

Textbook/Lab Manual Creation (revised):

- Clarification:
  - Table of contents/List of chapters
  - Expected length in pages
  - Expected areas of extent of revision of existing document/publication
- Verification:
  - Completed book in final or near final form (publication not required)

Course Development

- Creating online course acceptable first time to learn how to do online, if same course already taught; but not approved to "learn how to do online" more than once. If course already taught, converting to online is not approved activity.
- If creating *new* course that is campus supported for F2F or online, it is always an acceptable activity.
  - (Curriculum) Committee ready submission = 6 hours (equivalent to one conference day). Requests for additional credit must include documentation of additional effort and explanation of originality of course topic, approach, or description.
  - Instructor Ready submission =
  - 1 credit course=1 QUnit credit;
  - 2 Credit course=2 QUnit credit;
  - 3 Credit course=3 QUnit credit;
  - 4-5-6 Credit course=6 QUnit credit.
  - Anything additional (e.g., videos, graphics, etc.) must be planned out and explained per quarter in advance.
- Course proposal should include all fields as required by the college curriculum committee, at a minimum to include: 1) Introduction, including number of credits, intro paragraph, course justification, Student Learning Objectives; 2) Course Objectives; 3) Essential Student Materials; 4) Essential College Facilities; 5) Expanded Description: Content and Form (detailed); 6) Assignments; 7) Methods of Instruction; 8) Methods of Evaluating Objectives;

and 9) Texts and Supporting References.
- Courses prepared as "Instructor ready" shall be evaluated on case by case basis. Includes all content, assessments, and support materials.
  - Note: 6Q Unit F2F/Hybr=4Q Unit Online

Labs
- Clarification
  - Complete re-do of labs v. minor modification. Complete redo of labs, guides or manuals may be treated as PDL activity. Must include significant original material. Minor modification of existing labs or minor editing of existing lab manuals or instructor guide not typically approved PDL activity (considered primary) – would need additional clarification for consideration
- Verification
  - Lab documentation, manual, guide before and after versions.

Book/Publication Reading and Review
- Number of books/publications reviewed
  - Guideline: 10-15 books/quarter of PDL; averaging 200 pages typical text content per book/publication
- Length of each publication/book
- Verification:
  - Annotated bibliography must include:
    - summary of content
    - relevance/application to instruction
    - recommendations for use
    - citation

Research
- Data to be collected
- Number of subjects/data providers
- Research report – min 25 pages "Mini thesis"
- Data collection instruments (surveys, observation recording, etc.)
- Verification
  - Research report/thesis including surveys, instruments used, references, etc. – 25 p min.

Surveys
- Draft of survey questions
- Number of people interviewed
- What will be done with information
- Report of results; how it will be used; relevance/application to instruction, length of report

New Course
- Clarification
  - Proposed topic
  - Proposed unit equivalent
- Verification
  - Syllabus

- SLOs
- List of additional/supplemental instructional materials
- Must be curriculum committee ready using the campus course management system.

Internship/Work Experience
- Clarification
  - Must be unpaid
  - Hours of internship/work experience per week; number of weeks duration
  - Purpose and outcome
- Verification
  - Log of hours and activities
  - Signed Letter from internship sponsor

Creative Works
- Clarification
  - Number of original works - prints, paintings, poems, plays, videos, etc. - to be created during the PDL
  - Minimum length if written work; size or other relevant measurement for non-written work
  - Description of effort and time to produce a single piece
- Verification
  - Slides or copies of completed work or URL

Websites
- May be done once if learning new technology/platform/software design techniques; does not apply to entering information into existing campus templates for webpage.
- Must be created and completed by the faculty employee
- Clarification
  - Number of pages and links
  - List of items, topics to be created
  - Links to other pages
  - Purpose
- Verification
  - URL for the webpage site

- May be approved if major revision to existing site – reviewed on case-by-case basis
- Clarification
  - Full and detailed description of changes to be made
  - Expected differences between current and revised site
  - Why needed
  - Not intended for general updates to existing faculty webpage, except as wholesale revision
- Verification
  - URL for revised site
  - Copy of pages from existing webpage/s.

Travel

- Clarifications
    - Number and specific countries/locations/places of interest to be visited
    - Time in each location
    - Purpose: explanation of relevance/application of travel to current/planned assignments
- Verification
    - Travel log and diary of activities OR
    - Photo log annotated with locations and activities OR
    - Video log same as photo log
    - For each destination, summary of relevant/application to current/planned assignments.

Training/Re-Training

- Purpose
    - Program of study, work experience, or training
    - Defer the cost of tuition, books, fees, supplies associated with course of study. UNUSUAL – supplement income when course of study or experience is required by the district and results in additional living expenses due to necessity to live away from home – requires recommendation from President.
    - May NOT be used for travel, meals, lodging or conference fees. Funds for those may be requested through Staff Development.
- Reimbursement Formula:
    - $375 per Sem Unit – Public Institution
    - $250 per Qtr Unit – Public Institution
    - $525 per Sem Unit – Private Institution
    - $350 per Qtr Unit – Private Institution
    - Books - $700 Max
    - Academic Fees – no limit
    - Meals - none; $30 deduction when lunch and breakfast included in fee.
    - Workshops – 18 contact hours = 1 QUnit credit exchange

Addendum C – Frequently Asked Questions

INTERNSHIPS:
- Can I receive payment in the form of a stipend to help cover my expenses while on the internship experience?
  - Such payments cannot be in the form of salary, but may be allowed as a stipend to cover additional cost of housing, transportation and other expenses not normally incurred by the PDL faculty while on PDL internship.

DISTRIBUTION OF ACTIVITIES:
- Can I do all of my activities in one quarter, and then take the remaining quarters as time for myself?
  - No. Activities are distributed over the number of quarters requested and should be accomplished in those same quarters.
    a. Failing to do so creates a potential problem for the faculty employee who may not plan appropriately and end up not accomplishing the required activities; such an outcome will require repayment to the District for the activities not completed.
    b. Some activities may not be available in the quarters requested and alternatives may not be available.
    c. The faculty employee is being paid to be released from his/her regular assignments; If all the activities can be accomplished in one quarter, it remains questionable if the PDL leave really required the additional quarters originally requested. If you request more than one quarter, the District expects to see activities completed during all the quarters of leave.

COMPLETING ACTIVITIES:
- What if I don't complete all the activities that I planned and were approved?
  - It depends.
    a. First, the faculty should ALWAYS do a P2 Change Form prior to ANY change in activities.
    b. Typically, a failure to complete the approved activities means the committee will not be able to recommend approval to the Board. In this case the Committee will forward the report to the President for review and action. This often results in the employee having to pay back a portion of the leave.
    c. In some cases, the employee may have overextended him/herself and planned more activities than were reasonable for the time period on leave. These cases are reviewed on a case-by-case basis to ensure the faculty employee has completed activities that meet the letter and intent of the PDL leave. In some cases, the committee will send a recommendation to the President for review and action; in other cases, the Committee will recommend approval to the Board.
    d. The Committee always works with the applicant at the time of application to try to ensure that the activities are "doable" for the period of leave being requested.
  - Completion of Minimum educational units is required.
    a. In the event the courses are not successfully completed, the employee may need to repay the district for the unmet portion of the leave, the PDL report will be forwarded to the President for review and action.

- Is pass/fail okay or must I have a grade?
  - Pass/fail is acceptable – but you must pass.

- Can I take courses that I am already teaching?
  - Generally this is not an approved activity as it does not enhance your knowledge or prepare you for future assignments.
  - Requests to take classes in the area already teaching must be accompanied by detailed report of how doing so will enhance current capabilities. In addition to successful completion the faculty member is expected to provide a report of what was learned, how it enhanced capabilities, and how the information will be applied to current or future assignments.

- I want to adapt my course to an online format; is this acceptable?
  - Generally, this will be an approved activity for the first time a faculty employee is converting to online format on the basis that the faculty is learning new technology; subsequent conversions are not approved and are considered primary duties.

- Can I take some of my activities – e.g. courses or conferences – in the summer?
  - Generally, no; all activities must be completed during a regular academic quarter.