



# Overload Request Form

In accordance with Ohio University Faculty Handbook Section II.N, faculty cannot earn from all sources connected with Ohio University more than twenty-five percent (25%) beyond the salary amount specified for full-time service to the institution.

Overloads exceeding the 25% maximum must have the prior approval of the department chairperson/school director, the college dean, and the Provost's Office. These overloads cannot be submitted using Payroll's electronic Employee Management System (EMS). The Overload Request Form and the Overload Appointment Form must be used for this purpose. Submit completed forms to the Office of the Associate Provost for Academic Affairs, Attention: Anita Leach, 310 Cutler Hall.

If time constraints prevent units from obtaining prior written approval from the Provost's Office, the unit representative should contact Martin Tuck, Associate Provost for Academic Affairs to discuss the situation. (tuck@ohio.edu, 740-593-2577)

Compensation earned during periods when an individual is not under full-time contract, such as summer session pay or a summer research contract for individuals on academic-year contracts, is not considered overload compensation.

Information regarding how to process overloads under the 25% maximum can be found on the Payroll website at:

<http://www.ohio.edu/finance/payroll/parttimeempinfo.cfm>

Course Title: \_\_\_\_\_

Call Number: \_\_\_\_\_ Days/Time: \_\_\_\_\_ Quarter: \_\_\_\_\_

Credit Hours: \_\_\_\_\_ Campus: Athens Regional \_\_\_\_\_

Proposed Instructor: \_\_\_\_\_ Rank: \_\_\_\_\_

Department/School: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**Rationale for Request:** (please make sure all text is visible in the window)

**Name** (please print/type)

**Signature**

**Date**

\_\_\_\_\_  
Instructor

\_\_\_\_\_  
Chair of Requesting Department

\_\_\_\_\_  
Dean of Requesting College

\_\_\_\_\_  
Chair of Home Department

\_\_\_\_\_  
Dean of Home College

Martin Tuck

Associate Provost for Academic Affairs

Click **HERE** to  
return to form.

## Section II.N Overload Compensation for Contract Personnel

This policy starts from the basic position that a full time contract (i.e., a contract for 1.0 FTE each quarter of the academic year or longer period) issued by Ohio University to an individual represents payment for full-time work during that period. Accordingly, monetary overload compensation is defined as payment received from or through Ohio University beyond the contract amount specified for the person's full-time services to the institution.

1. Implementation of this policy should help to avoid the following:
  - a. Inconsistencies within a budgetary unit such as a college in treatment of contract personnel (e.g., payment versus non-payment to different faculty members or administrators for the same kind of work).
  - b. Inconsistencies among budgetary units such as colleges in treatment of contract personnel.
  - c. Assurances of overload compensation at the time of appointment as opposed to indications that such compensation may be available.
  - d. Failure to achieve full understanding among all concerned regarding such issues as the nature of duties for which overload compensation will be paid, and limits on the amount of overload that may be undertaken.
2. It is assumed that each budgetary unit has a clear and well-understood concept of a full work load (i.e., full-time work) for each of the positions in its budget. It is understood that assignments of duties and responsibilities in addition to the full load (i.e., overload assignments) are sometimes necessary in order to meet unforeseen contingencies, provide flexibility, meet student demand, and permit the completion of research projects, for example. Overload assignments should not be used when it would be more appropriate to create a new position.

Assurances of overload assignments and monetary compensation for such assignments cannot be given at the time of appointment to a regular position.
3. Overload assignments shall be accompanied by fair monetary or nonmonetary compensation. Reduction of the regular load in another time period, trading of duties, joint appointments, and other forms of nonmonetary compensation will be employed whenever feasible and consistent with University objectives. Monetary compensation may be in the form of overload pay or a drawing account that may be used to cover professional expenses. Overload pay, when the amount can be predetermined, is recognized by issuance of a special overload contract.
4. Overload assignments typically receiving monetary compensation from Ohio University funds include: off-campus teaching; correspondence teaching; continuing education; workshops; conferences and institutes; advanced-standing examinations; assumption of a substantial portion of the regular teaching or administrative duties of someone who is unable to complete them; and, for regional campus faculty only, additional teaching on their home campus. Other kinds of overload assignments, such as funded research time

their home campus. Other kinds of overload assignments, such as funded research time during the academic year, may receive monetary compensation from non-University (particularly, non-State-of-Ohio) budget sources. Extra compensation for duties included in the full-time contract, such as augmentation of the position (e.g., an endowed chair) or added non-base pay for assumption of administrative responsibility (e.g., a department chairperson), is not considered to be overload compensation. Compensation earned during periods when the individual is not under full-time contract, such as summer session pay or a summer research contract for an individual who is on an academic-year contract, is also not overload compensation. The accumulation of numerous part-time contracts which in total exceed 1.0 FTE for a period of time does not give rise to overload for any work exceeding 1.0 FTE.

5. Overload assignments shall be permitted and compensation provided when each of the following conditions is met:

- a. The proposed overload assignment is "professional" (i.e., within the contract person's area of expertise) as determined by the department chairperson and the dean or by other appropriate administrative officers.
- b. The proposed overload assignment serves the objectives of the University. These objectives include service to students and the public, meeting of demand for workshops and other forms of continuing education, maintenance of quality of instruction, and control of costs.
- c. The individual under consideration is able to complete all contracted duties and assignments adequately; the time and attention required by the overload assignment does not interfere with proper completion of the regular full load.
- d. The overload assignments of the individual under consideration will normally require in total no more than ten hours per week, although a heavier load may be acceptable for a short period.
- e. The individual predictably will earn from all sources connected with Ohio University no more than twenty-five percent (25%) beyond the salary amount specified for his/her full time services to the institution.

6. The dean of each college or regional campus is responsible for monitoring overload contracts and assuring that the conditions specified above are met. If any of these conditions is not met, the person making the assignment or initiating the overload contract must inform the dean in writing, stating the nature of any known exceptions and the reasons for making the assignment in spite of them. All exceptions will be reviewed and must have the approval of the department chairperson, the dean, or other appropriate administrative officers, and the Provost. Signing an overload contract will constitute such approval.

7. Overload contracts will be paid in one payment only, regardless of contract duration. Quarterly overload contracts will be paid on the closest bi-weekly pay date prior to the close of each academic quarter. All other overload contracts will be paid on the closest bi-weekly pay date following the completion of the contract.

