

TO:	Personnel and Budget Reps
FROM:	Mary Ann Libardi, Assistant to the Director of Academic Personnel
SUBJECT:	Helpful Notes
DATE:	October 15, 2008

DATES for 2008-2009 Personnel Actions

ACADEMIC APPOINTMENT DATES:

Fall Semester	09/01/08 - 01/24/09	13.05 pay periods (Paid through March)
Spring Semester	01/25/09 - 08/31/09	13.05 pay periods (March through August, if no fall appointment, then Jan. – Aug. 15.6)
Academic Year	09/01/08 - 08/31/09	26 pay periods
Encumbrance pay periods		26.1
January TT Hires	01/25/09 - 08/31/09	50% Salary- 15.6 PP
Sept. PA for Jan. Hire	09/01/09 - 01/xx/xx	100% Salary-26 PP

CALENDAR YEAR APPOINTMENT DATES:

Fall Semester	09/02/08 - 12/27/08	8.4 pay periods
Spring Semester	01/2/09 - 05/23/09	8.5 pay periods
Full Year	09/02/08 - 05/23/09	18.9 pay periods

DATES for 2009-2010 Personnel Actions

ACADEMIC APPOINTMENT DATES:

Fall Semester	09/01/09 – 01/16/10	13.05 pay periods (Paid through March)
Spring Semester	01/17/10 – 08/31/10	13.05 pay periods (March through August, if no fall appointment, then Jan. – Aug. 16.2)
Academic Year	09/01/09 – 08/31/10	26 pay periods
Encumbrance pay periods		26.1
January TT Hires	01/17/10 – 08/31/10	50% Salary- 16.2 PP
Sept. PA for Jan. Hire	09/01/10 – 01/xx/xx	100% Salary-26 PP

CALENDAR YEAR APPOINTMENT DATES:

Fall Semester	09/08/09 – 12/26/09	7.9 pay periods
Spring Semester	01/17/10 – 05/15/10	8.5 pay periods
Full Year	09/08/09 – 05/15/10	17.9 pay periods

DATES for 2010-2011 Personnel Actions

ACADEMIC APPOINTMENT DATES:

Fall Semester	09/01/10 - 01/15/11	13.05 pay periods (Paid through March)
Spring Semester	01/16/11 - 08/31/11	13.05 pay periods (March through August, if no fall appointment, then Jan. – Aug. 16.3)
Academic Year	09/01/10 - 08/31/11	26 pay periods
Encumbrance pay periods		26.1
January TT Hires	01/16/11 - 08/31/11	50% Salary- 16.3 PP
Sept. PA for Jan. Hire	09/01/11 - 01/xx/xx	100% Salary-26 PP

CALENDAR YEAR APPOINTMENT DATES:

Fall Semester	09/07/10 - 12/25/10	7.9 pay periods
Spring Semester	01/16/11 - 05/14/11	8.5 pay periods
Full Year	09/07/10 - 05/14/11	17.9 pay periods

DATES for 2011-2012 Personnel Actions

ACADEMIC APPOINTMENT DATES:

Fall Semester	09/01/11 - 01/21/12	13.10 pay periods (Paid through March)
Spring Semester	01/22/12 - 08/31/12	13.10 pay periods (March through August, if no fall appointment, then Jan. – Aug. 16)
Academic Year	09/01/11 - 08/31/12	26 pay periods
Encumbrance pay periods		26.2
January TT Hires	01/22/12 - 08/31/12	50% Salary- 16 PP
Sept. PA for Jan. Hire	09/01/12 – 01/xx/xx	100% Salary-26 PP

CALENDAR YEAR APPOINTMENT DATES:

Fall Semester	09/06/11 - 12/24/12	7.9 pay periods
Spring Semester	01/22/12 - 05/12/12	8.0 pay periods
Full Year	09/06/11 - 05/12/12	17.9 pay periods

Second Semester Appointments: PT faculty members whose *academic year spring contract is the same* (percentage of time, department, title, salary, etc.) as their fall contract should be reappointed on a Reappointment Form (with waiver memo attached).

Faculty Promotional Increments are as follows: Effective 9/1/2007**

Lecturer to Senior Lecturer	\$5,000
Senior Lecturer to Sr. Lecturer II	\$5,000
Instructor to Assistant Professor	\$6,700
Assistant to Associate Professor	\$8,100
Associate to Professor	\$13,230
Librarian I to Librarian II	\$5,350
Librarian II to Librarian III	\$6,700
Librarian III to Librarian IV	\$8,100
Librarian IV to Librarian V	\$9,250

Five College Faculty Rates effective 9/1/07:**

Professor	\$7,500
Associate Professor	\$7,000
Assistant Professor	\$6,500

Salary floors effective 7/8/07:**

<u>Title</u>	<u>Academic Year Salary</u>
Lecturer	\$46,750 (effective 9/1/07**)
Senior Lecturer	\$48,425
Senior Lecturer II	\$53,425
Instructor	\$47,245
Assistant Professor	\$55,240
Associate Professor	\$64,685
Professor	\$80,675
Librarian I	\$42,155
Librarian II	\$48,090
Librarian III	\$55,240
Librarian IV	\$64,685
Librarian V	\$74,860

**** The salary floor and promotion rates were taken from MSP contract dated 7/1/07-6/30/08. These amounts are subject to change.**

IMPORTANT REMINDERS

Calendar year part time faculty:

1. The salary floor for any calendar year appointments, the duties and responsibilities of which are confined to the academic year, shall be the same as the salary floor for academic year appointments.
2. A “Choice of Payment” form** must be completed for each new offer made on a calendar year basis.

** See attached MOU and “Choice of Payment” form.

Tenure cases: A maximum of three years credit toward tenure may awarded at the time of the initial appointment. Any appointment with tenure or any early tenure case *must* be approved by the Provost in advance.

Research Faculty: All faculty members using a Research title – Assistant/ Associate/ Professor – must be paid entirely from grant funds, and their responsibilities should primarily be in the area of research.

Change of Appointment Basis: Conversions to a calendar year appointment (and subsequent returns to an academic year) should always be processed in September. Keep in mind, the 15% conversion factor is to compensate the faculty member for the administrative responsibilities expected for the upcoming summer.

All calendar year appointments must be notified of the “Use it or lose it” policy in writing. All personal and vacation must be reported when used as it will be lost when converting back to an academic year appointment.

No change in status or salary MOU should be signed by the Department Head, Dean or faculty member without prior approval of the Provost.

Parental Leave policy: Medical documentation should always be attached to the Parental Leave application before sending to the Provost’s Office. The Parental Leave application should be completed in full, and the *exact semester dates* should be used in the return obligation section.

LWOP (first year): A newly hired faculty member who intends to go on a “leave without pay” before starting at UMass **MUST** attend a benefits orientation (or schedule a phone orientation with Kelly Pleasant) within a month of the LWOP effective date. An orientation is **IMPERATIVE** to the integrity of the employee’s benefits and if hire paperwork is not completed within a reasonable time; those benefits may be seriously effected. If the faculty member does not receive an orientation and complete the hire paperwork, a new offer will have to be processed for the faculty member’s actual start date.

TENURE DEADLINES FOR AY 2008-2009

For those faculty members with a tenure decision year of:

2008-2009 II, recommendations for tenure are due in the Provost's Office on **January 2, 2009.**

2009-2010 I, recommendations are due in the Provost's Office on **April 10, 2009.**

We are required to submit tenure cases to the President's Office approximately six weeks prior to meetings of the Trustees' Committee on Academic and Student Affairs. Our President's Office mailing deadlines are as follows:

Tenure Due In President's Office	Non-Tenure Items Due	CAASA Meeting Date	Trustees Meeting Date
12/19/08	1/16/09	2/4/2009	2/27/2009
4/10/2009	5/8/09	5/27/2009	6/10/2009
7/31/2009	8/28/09	9/17/2009	9/30/2009
10/2/2009	10/30/09	11/18/2009	12/10/2009

As of 9/5/08

**Tenure status may be checked on the Board of Trustees website at:
<http://www.massachusetts.edu/bot/votes.html>**

Tenure Track Appointments: Attached is a TDY Chart to determine the tenure decision year for faculty being hired through 1/2015. These dates are for faculty hired without credit towards tenure.

TDY CHART

Hire Date	TDY Date On Offer Form	TDY Date On PA
<u>9/1/2008</u>	<u>2013-2014 II</u>	<u>8/31/14</u>
<u>1/2009</u>	<u>2014-2015 I</u>	<u>1/31/15</u>
<u>9/1/2009</u>	<u>2014-2015 II</u>	<u>8/31/15</u>
<u>1/2010</u>	<u>2015-2016 I</u>	<u>1/31/16</u>
<u>9/1/2010</u>	<u>2015-2016 II</u>	<u>8/31/16</u>
<u>1/2011</u>	<u>2016-2017 I</u>	<u>1/31/17</u>
<u>9/1/2011</u>	<u>2016-2017 II</u>	<u>8/31/17</u>
<u>1/2012</u>	<u>2017-2018 I</u>	<u>1/31/18</u>
<u>9/1/2012</u>	<u>2017-2018 II</u>	<u>8/31/18</u>
<u>1/2013</u>	<u>2018-2019 I</u>	<u>1/31/19</u>
<u>9/1/2013</u>	<u>2018-2019 II</u>	<u>8/31/19</u>
<u>1/2014</u>	<u>2019-2020 I</u>	<u>1/31/20</u>
<u>9/1/2014</u>	<u>2019-2020 II</u>	<u>8/31/20</u>
<u>1/2015</u>	<u>2020-2021 I</u>	<u>1/31/21</u>

ACADEMIC VS. CALENDAR YEAR APPOINTMENTS

- **Academic year basis** – The salary will be paid over 13 biweekly pay periods or 26 biweekly pay periods.

September – March (fall semester, 13 biweekly pay periods)

March – August (spring semester, 13 biweekly pay periods)

September – August (both semesters, 26 biweekly pay periods)

1. **The biweekly salary will be smaller than a calendar year payment schedule.** The biweekly rate will be calculated on a 13 or 26 biweekly pay period schedule and it will be paid for each semester or the full year. However, the total contract amount will remain the same.
2. An employee **MUST** be active on the payroll system to be eligible for any COLA and merit raises. **A longer appointment period provides greater security in being active on payroll for any such raises.** The dates for any given year's raises vary and will be declared in the current MSP contract.
3. **A longer appointment period also ensures that a full semester's service will be credited to the state in terms of the state retirement system (pro-rated by percentage of time for any given appointment).**
4. **For benefited employees (50% time or above), a longer appointment period provides longer periods of time for any insurance(s) to be in effect.** After observing the sixty-day waiting period for new employees, health insurance would be provided from November to March for fall semester appointments effective September 1, from March to August for an appointment the following spring semester, and from April to August for a stand-alone spring semester appointment.

- **Calendar year basis** – Salary will be based on exact dates of service provided per semester.

September –December (fall semester) or shorter if not a full semester course

January – May (spring semester) or shorter if not a full semester course

September – May (both semesters)

1. **The bi-weekly salary will be larger than an academic year payment schedule.** The bi-weekly rate will be calculated on the exact day and weeks determined for

any given semester's responsibilities. However, the total contract amount will remain the same.

2. An employee **MUST** be active on the payroll to be eligible for any COLA and merit raises. **A shorter appointment period provides greater risk for failure to be active on the payroll system when the current year's COLA and merit raises are calculated.** The dates of said raises will vary based on the current year's MSP contract.
3. **A shorter appointment period will provide only a few months credit of service towards the state retirement system** (again, this service period is prorated based on the percentage of time for any given appointment). This service credit would be shortened by approximately nine weeks (per semester). If the appointment period is even shorter than a full semester, even fewer months of service credit will be counted by the state board of retirement.
4. **For benefited employees (50% time or above), a shorter appointment period will provide only a few months for any insurance(s) to be in effect.** For example, after observing the sixty-day waiting period, health insurance would only be in effect from November to December for fall semester appointments effective September 1 and from April to May for an appointment the following spring semester or for a stand-alone spring semester appointment. **Please be aware that if the dates of the calendar year appointment are shorter than the full semester, than this insurance coverage would be even shorter.**
5. **If a calendar year option is chosen, a waiver of understanding of the above mentioned implications must be signed by the employee for each appointment period.**

PLEASE NOTE:

All information regarding insurance and retirement is provided for guidance only. Decisions regarding insurance benefits and retirement credit are beyond the purview of the University, and no commitment is made or implied by the provision of this information.

CHOICE OF PAYMENT

Calendar year option

September –December (fall semester) or shorter, if course is less than a full semester

January – May (spring semester) or shorter, if course is less than a full semester

September – May (both semesters)

By choosing this option I understand that:

1. My bi-weekly salary will be larger than if I choose an academic year payment schedule. My bi-weekly rate will be calculated on the exact days and weeks determined for any given semester's responsibilities. However, the total contract amount will remain the same.
2. **Because I may not be active on payroll year round, I may not be eligible for general salary increases, cost-of-living increases, or merit raises for the duration of my appointment period or subsequent appointments.** The dates of said increases will vary based on the current MSP contract.
3. **If I am a benefited employee (50% or above), I will not have a full semester's time (pro-rated to percentage of time) credited to my state service for retirement purposes.** My pro-rated state service will be shortened by approximately nine weeks (per semester) and will be based on the exact dates I am active on the payroll system.
4. **If I am a benefited employee (50% or above), I understand that all my insurance(s) will be terminated the last day of the month in which my appointment ends.** A calendar year appointment would terminate any insurance at the end of the month in which I am no longer active on payroll.
5. Any vacation or personal time that I earn during this appointment must be used during periods when University classes are not in session. **Any vacation or personal time that I accrue but do not use during the term of my appointment will be forfeited without compensation at the end of that appointment.**

I hereby choose to be paid on a calendar year basis instead of an academic year basis. I understand the implications listed above and the consequences of such an appointment.

Print Name: _____

Signature: _____

Department: _____

Semester & Year of Appointment: _____

Date: _____

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