Overview
The University of Massachusetts – Amherst reached agreement with the Massachusetts Society of Professors (MSP) on a one-year extension of the current collective bargaining agreement (CBA). The Agreement is in effect from July 1, 2020 through June 30, 2021. Below is a summary of the key changes reflected in the Agreement.

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General

Carry-Forward of Existing Contractual Provisions
All existing contractual provisions of the 2017-2020 MSP collective bargaining agreement will be carried forward unless otherwise modified by the one-year agreement and described herein.

No Salary Increases
There will be no across-the-board salary increases during fiscal year 2021. Promotional increments scheduled for September 1, 2020 will proceed on schedule.

Online Education for 2020-2021 Academic Year
In response to the COVID-19 health crisis, the agreement provides a framework for remote teaching during the Fall 2020 semester. The following provisions related to online education will sunset on June 30, 2021.

Course Designations and Definitions
All course sections during the Fall 2020 academic semester will be designated by the University into one of the below modalities:

**Face-to-Face only**
Courses that must be delivered in person where remote learning is not feasible, such as labs, studio, and performance classes.

**Traditional Face-to-Face plus blended**
A traditional course that will include use of technologies so that all students (on-campus and remote) can access all content and necessary course materials remotely through video broadcast, lecture capture, and utilization of learning management systems such as Blackboard or Moodle. Instructors will follow normal protocols as a face-to-face class, with no alternative curricula or separate synchronous activities required.

**Fully-Online**
An online-only course or course section with no face-to-face component where all students access the content and complete assessments remotely for the entire semester.

Course Assignments
Consistent with standard practice, faculty teaching assignments will be developed at the department or program level. Faculty members must be provided prior and reasonable consultation regarding their assignment.
Workload Adjustments

**Course Conversion**
Instructors who develop *Fully-Online* courses must engage extensively with information technology, instructional design and pedagogy experts from Instructional Design, Engagement and Support group (IDEAS), the Center for Teaching and Learning (CTL), the Libraries and other relevant resources to ensure that the course or section meets University Quality Standards.

In lieu of additional compensation, faculty who are required to convert traditional courses or sections to *Fully-Online* will be granted a workload modification or other accommodation in recognition of the time and effort required for course development. The faculty member will choose one of the following options which will then be articulated in writing between the faculty member and their respective Department Head/Chair. Any other arrangement must be agreed to by the faculty member, the MSP, and the Provost’s office.

1. **Future course release** to be taken in one of the following seven academic semesters. Timing of the course release must be approved by the Department Head/Chair.

2. **One year sabbatical credit** to be added to the faculty member’s sabbatical bank. Tenured faculty are expected to choose this option unless it’s not workable.

3. **One semester credit toward continuous appointment** applicable for non-tenure track faculty only.

Faculty who prepare a *Face-to-Face only* or a *Traditional Face-to-Face plus blended* course will not have any workload adjustment or accommodation beyond anything already agreed upon between the department and the faculty member.

**Course Delivery**
*Face-to-Face only* will be taught on-load.

*Traditional Face-to-Face plus blended* courses will also be taught on-load unless a course has 15 or more remote-only students or more than 25% of the total course enrollment of remote-only students. If either of these thresholds are met, a *Fully-Online* section will be opened up for the remote students or the entire course will be moved *Fully-Online* unless the department chair and instructor can agree upon an alternative solution.

The department chair and instructor may discuss whether additional support is necessary if a *Traditional Face-to-Face plus blended* course has up to 15 remote-only students.
*Fully-Online* discussion courses with 12 or fewer students for which the instructor does not create alternative curricula or put in additional course development or conversion work will be taught on-load without any workload adjustment or accommodation.

**Summer 2020 Work**
Faculty will be required to work for two weeks during the summer 2020 without compensation for the purpose of curriculum planning, course preparation, and training for remote instruction.

**Technology and Instructional Design Support**
The University will provide necessary support to faculty in order to convert and teach *Traditional Face-to-Face plus blended* and *Fully-Online* courses. Additionally, departments may appointment faculty with specialized training or experience in online education to provide additional technical and instructional design support and mentoring to colleagues. Faculty appointed to these roles are eligible for the aforementioned workload adjustments available to faculty who convert traditional courses or sections to *Fully-Online*.

**Teaching Evaluations – SRTIs**
The Student Response to Instruction (SRTI) will be suspended during the Fall 2020 semester. Instructors who want to receive student feedback may use SRTI, Forward FOCUS, or create their own forms.

**Funds available to Bargaining Unit Members**

*Technology Needs*
There will be an improved process for providing technology needed by faculty for online teaching. The existing Chancellor’s computer replacement fund (CCRF) will be utilized for this purpose.

*Childcare and Eldercare Assistance*
The current childcare assistance fund will provide some support for emergency childcare needs if childcare and schools are closed. Eligibility for the fund has been expanded to support elder care needs for bargaining unit members who are caring for family members.

**Academic Calendar Change & Campus Reopening**
The agreement compresses the fall work schedule for faculty on academic year appointments to support the academic calendar adopted by the Faculty Senate.
Other Provisions

Dues Check-Off
This provision was revised to delete references to agency fees pursuant to the 2018 Janus v. AFSCME U.S. Supreme Court decision. See Article 6.
Anticipated Implementation Date: Immediate.

Agency Fee
This provision regarding agency fees was deleted pursuant to the 2018 Janus v. AFSCME U.S. Supreme Court decision. See Article 7.
Anticipated Implementation Date: Immediate.

Faculty Personnel Standards and Procedures

Promotion to Full Professor Criteria
The agreement incorporates the criteria for promotion to full professor outlined in the Academic Personnel Policy (“Redbook”). Relative weight is to be given in the areas of teaching; of research, creative or professional activity; and of service in light of the duties of the faculty member when considering if the following criteria have been met:
- a) the faculty member has achieved substantial recognition on and off campus from scholars or professionals in the faculty member’s field and
- b) the candidate has shown significant potential for continued professional achievement.
See Article 12 and the Redbook.
Anticipated Implementation Date: Immediate.

Reappointment, Promotion, and Tenure Process

Committee Composition: The agreement clarifies that Department Personnel Committees (DPCs) must have a minimum of three faculty members and that all members of the College Personnel Committee (CPC) must be bargaining unit members. See Article 12.
Anticipated Implementation Date: Immediate.

Earlier Submission of the Basic File: The agreement requires an earlier submission of the basic file. See Article 12.
- Notice of a personnel review must be sent to the faculty member no later than the end of the third calendar week of the semester before the review is to be initiated (previously the semester in which the review is initiated).
- Faculty members must now submit all materials for external referees to review by May 1st of the semester before the review is to begin.
- Faculty members must submit any remaining materials for inclusion in the basic file by the first week of the semester in which the review is to begin.
Failure to submit the basic file by **September 15th** of the tenure review year will result in issuance of a notice of non-reappointment and elimination of the terminal year.

*Anticipated Implementation Date:* Effective for the 21-22 Academic Year review cycle.

**Internal Solicitation:** The agreement clarifies that for tenure and promotion cases, the Department Chair/Head may solicit internal (on-campus) letters from faculty colleagues. Similar to the external reviewer list, the list of internal letter writers shall include, but is not limited to, those suggested by the faculty member. Only external referees will have access to candidate materials. See Article 12.

*Anticipated Implementation Date:* Effective for the 21-22 Academic Year review cycle.

**Eliminates Rejoinders:** The agreement eliminates multiple responses that can be added to the basic file following a recommendation for or against tenure and/or promotion.

*Anticipated Implementation Date:* Immediate.

**Elimination of Off-Cycle Reviews**
Tenure-track faculty whose appointments start in January will have their reviews for major personnel actions “on-cycle.” The promotional salary increment will be retroactive to the date as if the review occurred “off-cycle.” See Article 12.

*Anticipated Implementation Date:* Tenure-track faculty scheduled to be reviewed during the January 2021 semester will proceed off-cycle. All other off-cycle tenure-track faculty will transition to the on-cycle schedule with one semester added to their tenure decision year. Tenure-track offer letters for prospective January hires will be revised to reflect the change.

**Appointment and Reappointment Form/Letter**
The agreement reduces administrative burden by allowing the appointment and reappointment letter to substitute for the Offer and Acceptance (O&A) Form and the reappointment form, respectively. See Article 14.

*Anticipated Implementation Date:* Effective immediately for tenure-track faculty. Any change to existing practice for non-tenure track faculty and librarians will be communicated prior to January 2021 appointments.

**Librarian Flexible Work Options**
The agreement allows librarians to apply for flexible work arrangements when certain criteria are satisfied. See Article 20.

*Anticipated Implementation Date:* Immediate.

**Personnel Files**
Newly revised provisions allows designated University administrators to share personnel file information with authorized union representatives regarding anticipated employment actions. See Article 24.

*Anticipated Implementation Date:* Immediate.
Leaves of Absence

Sick Leave for Family or Medical Needs
The agreement improves the process for bargaining unit members who request sick leave due to family or medical needs while protecting employee confidentiality. Bargaining unit members will submit a written request to their department chair or immediate supervisor outlining that a medical condition exists warranting the need for a leave, the anticipated duration of the leave, how time and attendance should be submitted during the leave, and a proposed work schedule if requesting an intermittent leave. Supporting medical documentation, if required, will be provided to a confidential office outside of the department. See Article 27.
Anticipated Implementation Date: Pending.

Tenure Decision Year (TDY) Delays for Family or Medical Needs
The agreement improves the process for bargaining unit members requesting TDY delays due to family or medical needs while protecting employee confidentiality. The sick leave committee will review all such requests for TDY delays and send a recommendation to the Dean. The Dean will provide its recommendation to the Provost and Chancellor who will notify the faculty member of the decision. See Article 27.
Anticipated Implementation Date: Immediate.

Bereavement Leave
The agreement updates the definition of a qualifying family member and provides five days (previously four) of bereavement leave for eligible bargaining unit members. See Article 27.
Anticipated Implementation Date: Immediate.

Annual Faculty/Librarian Reports and Evaluation of Professional Activities (AFR/ALR)

AFR/ALR Advisory Committee: The Provost will appoint an advisory committee for the purpose of making recommendations to improve the AFR/ALR forms and annual evaluation process, including an anticipated transition to a modern faculty activity reporting software system. The committee will include faculty and librarians and will be interdisciplinary in nature.
Anticipated Implementation Date: Pending.

Right of Response: Faculty and librarians will be provided three calendar days to respond to each level of review of their AFR/ALR. See Article 20 and Article 33.
Anticipated Implementation Date: Effective for Academic Year 20-21 AFR submission cycle (faculty) and July 2020 ALR submission cycle (librarians).
Funds and Programs to Support Bargaining Unit Members

**Chancellor’s Computer Replacement Fund (CCRF)**
Funds for CCRF applications will be allocated by the Provost to each school or college based on their FTE as of September 1st of the preceding year. Individual awards will be reviewed and approved by the respective school or college annually for the purpose of replacing outdated computers. See Article 26.

_Anticipated Implementation Date:_ Effective Academic Year 21-22.

**Transition Fund**
Benefited bargaining unit members who incur unreimbursed expenses, such as moving or relocation expenses or out-of-pocket medical costs associated with their transition to UMass may apply for a taxable subsidy/stipend through the transition fund (previously healthcare assistance fund). Applicants must submit supporting documentation of unreimbursed expenses in order to receive funds. See Article 26.

_Anticipated Implementation Date:_ Immediate.

**Childcare and Eldercare Assistance Fund**
The existing childcare assistance fund has been expanded to include eldercare assistance. All bargaining unit members are eligible to apply upon invitation from the Provost’s Office. See Article 26.

_Anticipated Implementation Date:_ Immediate.

**State Employee Responding as Volunteers Program (SERV)**
Bargaining unit members may participate in the SERV program that is currently available to the employees of the Commonwealth of Massachusetts in accordance with the established guidelines for the program.

_Anticipated Implementation Date:_ Immediate.

**Partner Employment Program**
This existing program is now included as part of the collective bargaining agreement.

_Anticipated Implementation Date:_ Immediate.

**Research Intensive Semesters (RIS)**
The agreement provides a standard floor/minimum for Research Intensive Semesters across all schools and colleges. See Appendix D.

_Anticipated Implementation Date:_ Immediate.

**Provisions Specific to Non-Tenure Track Faculty**

**Lilly Fellowships**
Confirms that Full-time non-tenure track faculty are eligible for Lilly Fellowships through the Center for Teaching and Learning. See Article 21.

_Anticipated Implementation Date:_ Effectively Immediately.
**Professional Improvement Fellowships**
The agreement expands access to clinical and extension non-tenure track faculty who have completed six years of service and are not funded on grants or contracts. See Article 21.
*Anticipated Implementation Date: Immediate.*

**Research and Extension Faculty**
Promotional processes, salary schedules, and promotional increments previously agreed to in separate bargaining processes are now included in the master agreement. See Article 21 and Article 26.
*Anticipated Implementation Date: Immediate.*