

# Summary of Major Personnel Actions and Other Procedures, AY 2009-2010

*Except as noted (\*), the dates listed in this document are campus deadlines; dates preceded by asterisks are Trustee-mandated deadlines. When a Trustee-mandated deadline falls on a Saturday/Sunday personnel actions should be completed by the preceding Friday.*

*The terms "department," "chairperson," "college" and "dean" may also refer to heads of programs, schools, or institutes. Unit administrators who are not clear as to the application of these terms to their unit in this document should refer their questions to the Provost's Office.*

## **I. ANNUAL REPORTS**

- A. Annual Faculty Reports**
- B. Librarian Annual Reports**

## **II. LEAVES OF ABSENCE**

- A. Applications for AY 10-11 Sabbatical Leaves and Leaves With or Without Pay**
- B. Request for exception to Board of Trustee policy on required return from AY 09-10 sabbatical leave**
- C. Request for exception to Board of Trustee policy on immediate return from AY 09-10 sabbatical leave**

## **III. REAPPOINTMENTS**

- A. Reappointment to 2<sup>nd</sup> Probationary Year (AY 2010-2011 = 1<sup>st</sup> Probationary Year)**
- B. Reappointment to 3<sup>rd</sup> Probationary Year (AY 2010-2011 = 2<sup>nd</sup> Probationary Year)**
- C. Reappointment to 4<sup>th</sup> or 5<sup>th</sup> Probationary Year (AY 2010-2011 = 3<sup>rd</sup> or 4<sup>th</sup> PY)**
- D. Reappointment through 6<sup>th</sup> Probationary Year (through Tenure Decision Year, also called "Fourth Year Review")**
- E. Reappointment with Tenure (Tenure Decision Year = AY 2009-2010)**

## **IV. PROMOTIONS**

- A. Faculty Promotion to senior rank (without tenure consideration)**
- B. Librarian Promotion to all ranks**
- C. Promotion from Lecturer to Senior Lecturer**

## **V. PERIODIC MULTI-YEAR REVIEW (PMYR)**

## I. ANNUAL REPORTS

(Forms may be downloaded from <http://www.umb.edu/academics/Provost/forms.html>)

### A. Annual Faculty Reports

#### September 2009

**17** Reports from faculty to chairpersons with appropriate sections completed; chairpersons pass the reports to personnel committees

#### October 2009

**09** Personnel committees return reports to chairpersons with appropriate sections completed

**15** Reports from chairperson to faculty (with appropriate sections completed by department personnel committee and chairperson)

**21** Reports (with signature) returned by faculty to chairpersons

**26** Faculty Annual Reports from chairpersons to deans

### B. Librarian Annual Reports

#### September 2009

**17** From librarians to supervisors with appropriate sections completed

**25** Supervisor forwards reports to department head or Associate University Librarian

#### October 2009

**09** Personnel committees return reports to chairpersons with appropriate sections completed

**15** Reports from librarians to Library Personnel Committee (LPC)

**21** Reports from LPC to University Librarian

**27** Reports from University Librarian to librarians for signature

**30** Annual reports from librarians (with signature) forwarded to University Librarian

## II. LEAVES OF ABSENCE

### A. Applications for AY 10-11 Sabbatical Leaves and Leaves With or Without Pay

#### November 2009

**05** Applications for sabbatical leave or leaves of absence for AY 10-11 from faculty to chairpersons and from librarians to Associate University Librarian

#### December 2009

**03** Recommendations regarding sabbatical leaves and leaves of absence for AY 10-11 from chairpersons to deans and from Associate University Librarian to University Librarian

**18** Sabbatical reports from Spring 09 due to Provost

#### January 2010

**29** Recommendations regarding sabbatical leaves and leaves of absence for AY 10-11 from deans to Provost and from University Librarian to Provost

#### March 2010

**31** Notification to faculty/librarians regarding sabbatical or leaves of absence for AY 10-11

#### May 2010

**07** Requests for modifications in period of sabbatical leave during AY 10-11 from applicant to chairperson. (NOTE: requests for changes from full-year to one-semester sabbaticals will normally not be granted if submitted after this date)

**18** Requests for modification in period of sabbatical leave during AY 10-11 from chairpersons to deans or University Librarian

**21** Requests for modification in period of sabbatical leave during AY 10-11 from deans and University Librarian to Provost

**28** Sabbatical reports from Fall 09 due to provost

#### June 2010

**18** Notification to faculty and librarians regarding requests for modification in period of sabbatical leave during AY 10-11

## **B. Request for exception to Board of Trustee policy on required return from AY 09-10 sabbatical leave**

### **September 2009**

**15** Request from faculty or librarian to chairperson or department head in cases in which the sabbatical leave ends before 1/24/10 (NOTE: requests made after this date will normally not be considered)

**22** Requests from chairpersons to deans or department heads to University Librarian in cases in which the sabbatical leave ends before 1/24/10

**30** Requests from deans or University Librarian to provost in cases in which the leave ends before 1/24/10

### **October 2009**

**13** Requests from provost to chancellor in cases in which the sabbatical leave ends before 1/24/10

**20** Requests from chancellor to president in cases in which the sabbatical leave ends before 1/24/10

### **December 2009**

**08** By this date, notification to faculty or librarians regarding decision on request for exception to Board of Trustee policy on required return from sabbatical leave which ends before 1/24/10

### **January 2010**

**27** Requests for exception to Board of Trustee policy on required return from sabbatical leave from faculty or librarian to chairperson or department head in cases of faculty or librarians on leave for AY 09-10 year or on leave in the Spring 2010 semester.

### **February 2010**

**03** Requests from chairperson to deans or from department heads to University Librarian

**12** Requests from deans or University Librarian to provost

**23** Requests from provost to chancellor

### **March 2010**

**12** Requests from chancellor to president

### **June 2010**

**15** By this date, notification to faculty members or librarians regarding decision on request for exception to Board of Trustee policy on required return from AY 09-10 sabbatical leave

## C. Request for exception to Board of Trustee policy on immediate return from AY 09-10 sabbatical leave

### September 2009

- 17** Requests from faculty or librarian to chairperson or department head in cases in which the sabbatical leave ends before 1/24/10 (NOTE: requests made after this date will normally not be considered)
- 24** Requests from chairpersons to deans or department heads to University Librarian in cases in which the sabbatical leave ends before 1/24/10

### October 2009

- 02** Requests from deans or University Librarian to provost in cases in which the sabbatical leave ends before 1/24/10
- 13** Requests from provost to chancellor in cases in which the sabbatical leave ends before 1/24/10
- 20** Requests from chancellor to president in cases in which the sabbatical leave ends before 1/24/10

### December 2009

- 08** By this date, notification to faculty or librarians regarding decision on request for exception to Board of Trustee policy on immediate return from sabbatical leave which ends before 1/24/10

### January 2010

- 27** Requests from faculty or librarian to chairperson or department head in cases of faculty or librarians on leave for AY 09-10 year or on leave in the Spring 2010 semester

### February 2010

- 05** Requests from chairpersons to deans or department heads to University Librarian
- 16** Requests from deans or University Librarian to provost
- 23** Requests from provost to chancellor

### March 2010

- 12** Requests from chancellor to president

### June 2010

- 15** By this date, notification to faculty or librarians regarding decision on request for exception to Board of Trustee policy on immediate return from current sabbatical leave

### III. REAPPOINTMENTS

#### A. Reappointment to 2nd Probationary Year (AY 2010-2011 = First Probationary Year)

##### September 2009

**15** Chairs receive materials from faculty for personnel reviews scheduled during AY 09-10 and confirm to deans faculty members being reviewed

##### February 2010

**05** Recommendations regarding reappointment to 2nd PY from departments to deans

**12** Recommendations on reappointment to 2nd PY from deans to provost

##### March 2010

**01** (\*) By this date, notification of reappointment or expiration of appointment of probationary faculty in 1st service year (those whose current contracts expire 8/31/10) from Delegated Appointing Authority to candidates (with copies to intervening administrators)

#### B. Reappointment to 3rd Probationary Year (AY 2010-2011 = Second Probationary Year)

##### September 2009

**15** Chairs received materials from faculty for personnel reviews scheduled during AY 09-10 and confirm to deans faculty members being reviewed

##### November 2009

**06** Recommendations regarding reappointment to 3rd PY from chairs to deans

**17** Recommendations regarding reappointment to 3rd PY from deans to provost

##### December 2009

**15** (\*) By this date, notification of reappointment or expiration of appointment of probationary faculty in 2nd service year (those whose current contracts expire 8/31/10) from Delegated Appointing Authority to candidate (with copies to intervening administrators)

#### C. Reappointment to 4th or 5th Probationary Year (AY 2010-2011 = 3rd or 4th PY)

##### September 2009

**15** Chairs receive materials from faculty for personnel reviews scheduled during AY 09-10 and confirm to deans faculty members being reviewed

### **March 2010**

- 31** Recommendations for reappointment to 4th or 5th PY from departments to deans

### **April 2010**

- 30** Recommendations for reappointment to 4th or 5th PY from deans to provost

### **August 2010**

- 15** (\*) By this date, notification of reappointment or expiration of appointment of all probationary faculty whose current contracts expire 8/31/11 from Delegated Appointing Authority to candidates

## **D. Reappointment through 6th Probationary Year (through Tenure Decision Year, also called "Fourth Year Review")**

### **September 2009**

- 15** Chairs receive materials from faculty for personnel reviews scheduled during AY 09-10 and confirm to deans faculty members being reviewed

### **December 2009**

- 01** Recommendations regarding reappointment through the 6th Probationary Year from chairpersons to deans for distribution to the college personnel committee

### **February 2010**

- 01** Recommendations regarding reappointment through the 6th PY from college personnel committee to dean

### **March 2010**

- 01** Recommendations for reappointment through the 6th PY from deans to provost

### **May 2010**

- 01** Notification of reappointment through the 6th PY to faculty members

### **August 2010**

- 15** (\*) By this date, notification of reappointment or expiration of appointment of all probationary faculty whose current contracts expire 8/31/11 from Delegated Appointing Authority to candidates

## **E. Reappointment with Tenure (Tenure Decision Year = AY 2009-2010)**

### **September 2009**

**15** Chairs receive materials from faculty for personnel reviews scheduled during AY 09-10 and confirm to deans faculty members being reviewed

**18** Tenure files from chairperson to department personnel committees for review

### **October 2009**

**16** Recommendations regarding tenure from department personnel committee to chairperson

**23** Recommendations regarding tenure from chairpersons to deans for distribution to college personnel committee

### **December 2009**

**04** Recommendations regarding tenure from college personnel committee to dean

### **January 2010**

**15** Recommendations regarding tenure from deans to provost

### **March 2010**

**15** By this date, all recommendations regarding tenure from provost to chancellor

### **April 2010**

**10** All recommendations regarding tenure from chancellor to president

### **June 2010**

**15** By this date, notification to faculty of Board of Trustee approval of tenure in cases submitted for consideration at the June Board Meeting

### **August 2010**

**15** (\*) By this date, deadline for notification of Expiration of Appointment (8/31/11) in tenure cases in which the chancellor does not recommend tenure to the President and the Board of Trustees

## IV. PROMOTIONS

### A. Faculty Promotion to senior rank (without tenure consideration)

#### September 2009

**15** Chairs receive materials from faculty for personnel reviews scheduled during AY 09-10 and confirm to deans faculty members being reviewed

**18** Chairs provide materials from faculty to departmental personnel committees

#### February 2010

**04** Recommendations regarding promotion to senior rank (without tenure consideration) for faculty from chairpersons to deans for distribution to college personnel committees

#### March 2010

**10** Recommendations regarding promotion to senior rank (without tenure consideration) for faculty from college personnel committee to dean

#### April 2010

**15** Recommendations regarding promotion to senior rank for faculty from deans to provost

#### May 2010

**05** Written notification from faculty member to chairpersons of intent to submit name for promotion to senior rank in AY 10-11

#### August 2010

**15** By this date, notification of promotion from Delegated Appointing Authority to faculty (with copies to intervening administrators); this deadline may be extended in certain cases

### B. Librarian Promotions (to all ranks)

#### December 2009

**10** Written notification from librarian to University Librarian of intent to submit name for promotion

#### February 2010

**04** Materials for librarian promotion file submitted to supervisor

**19** Recommendations regarding librarian promotion from supervisor to personnel committee

### **March 2010**

**10** Recommendations regarding promotion from library personnel committee to University Librarian

### **April 2010**

**15** Recommendations regarding promotion from University Librarian to provost

### **June 2010**

**10** Notification of promotion from Delegated Appointing Authority to librarians with copies to intervening administrators (this deadline may be extended in certain cases)

## **C. Promotions from Lecturer to Senior Lecturer**

### **November 2009**

**30** Notification to deans regarding list of faculty eligible for promotion to Senior Lecturer

### **December 2009**

**10** Chairpersons notify lecturers to provide promotion materials by 2/5/10 for reviews scheduled during AY 09-10

### **February 2010**

**05** Chairpersons receive promotion materials from lecturers for reviews scheduled during AY 09-10 and confirm to deans the names of the lecturers being reviewed

**10** Chairpersons distribute promotion materials to departmental personnel committees

### **March 2010**

**10** Recommendations regarding promotion from departmental personnel committee to chairpersons

**30** Recommendations regarding promotion from chairpersons to dean for distribution to college personnel committee

### **April 2010**

**17** Recommendations regarding promotion from college personnel committee to dean

## May 2010

- 10** Recommendations regarding promotion from deans to provost

## August 2010

- 14** By this date, notification of promotion from Delegated Appointing Authority to faculty (with copies to intervening administrators); this deadline may be extended in certain cases

## V. Periodic Multi-Year Review (PMYR)

### October 2009

- 09** Chairpersons submit names of faculty scheduled for PMYR during AY 09-10 to deans
- 16** Deans submit names of faculty scheduled for PMYR in AY 09-10 to provost

### November 2009

- 02** Faculty scheduled for PMYR receive written notification from chairpersons to prepare their statements, and submit no later than 02/01/10

### February 2010

- 01** By this date, faculty scheduled for PMYR submit their 2000 word (or less) statement, CV, and any request for professional development support to departmental personnel committee and chairpersons

Chairpersons provide personnel committee with annual reports and student evaluations

### March 2010

- 01** Recommendations of personnel committee and chairpersons to PMYR faculty and dean
- 25** Deans submit recommendations to PMYR faculty, personnel committee and chairpersons

### April 2010

- 30** PMYR development plans and requests for support submitted from faculty to dean

### May 2010

- 01** Chairpersons submit names of faculty eligible for PMYR in AY 10-11 to deans (for reporting to provost). Chairpersons are responsible for ensuring that such faculty members are aware of their rights and responsibilities
- 05** Deans submit annual PMYR report to provost for faculty reviewed during AY 09-10