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# TAUP

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## TAUP Proposal to Temple University April 20, 2009

### Full Proposal Details

**Duration** – 3 years – July 1, 2008 to June 30, 2011

**Article 7 Fair Share:** TAUP shall be authorized to collect a fair share fee calculated in accordance with applicable law from all members of the bargaining unit.

**Article 11 Promotion and Tenure:**

C. Promotion Procedures

1. The University Tenure and Promotion Advisory Committee shall report to the Provost or other designated University officer, and shall be composed of at least sixteen (16) voting faculty members from the TAUP bargaining unit; half shall be faculty members elected by the Faculty Senate. The remaining faculty members shall be appointed by the Provost. Individuals serving on the University Tenure and Promotion Advisory Committee shall serve two (2) year terms, with a staggered rotation to assure that half of such members continue on the Advisory Committee each year. No more than two (2) faculty members from any one department, college or school may serve at any one time.

**Article 15: Nontenure-Track Faculty Classifications:**

B.

3. At the time of initial appointment and at each reappointment, the term of the appointment and the responsibilities of the nontenure-track faculty member shall be clearly defined in the appointment letter signed by the appointing authority. In the case of faculty continuing on multiple year appointments, the Dean annually shall provide the faculty member with a letter outlining the faculty member's assignments and responsibilities for the coming year. The responsibilities as specified in the foregoing appointment and annual letters shall be used as the primary criteria by which to evaluate the faculty member's performance and eligibility for reappointment, promotion and merit and/or pay for performance. If the responsibilities of a nontenure-track faculty member were changed during the previous year, it shall be documented in his/her annual report and acknowledged by the department chair.
4. Nontenure-track faculty members who have appointments continuing into the next academic year or who are expected to receive an appointment for the next academic year shall meet with the Dean or the Dean's designee to discuss the faculty member's performance in meeting his/her responsibilities in the current year. Such performance evaluation meetings shall take place no later than March 1. Evaluations shall be based on multiple measures of performance and accomplishment in relation to the type of

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appointment. A written summary of the performance evaluation shall be provided to the faculty member and placed in the individual's official personnel file. A performance evaluation meeting pursuant to this section will not constitute a reappointment or promise of continued appointment.

### **Article 20 Salaries:**

#### A. Salaries:

July 1, 2008 - \$2,100 ATB + 1% merit  
July 1, 2009 - 2.75% ATB + 1% merit  
July 1, 2010 - 3.25% ATB + 1% merit

#### B. Salary Minima: All minima effective July 1, 2008

<b>Faculty</b>	<b>Salary Minimum</b>
Instructors (all classifications)	\$44,000
Assistant Professor (all classifications)	\$46,750
Associate Professor (all classifications)	\$52,250
Professor (all classifications)	\$63,250

<b>Librarians</b>	
L1	\$40,150
L2	\$42,350
L3	\$45,650
L4	\$50,050

<b>Academic Professionals</b>	
L7	\$21,749
L8	\$23,466
L9	\$25,322
L10	\$27,388
L11	\$29,597
L12	\$31,992
L13	\$34,604
L14	\$37,402
L15	\$40,335
L16	\$43,557
L17	\$46,319

#### C. Additional Increases for Promotion:

1. Any faculty member or librarian who is promoted in rank or grade level effective any July 1, shall receive a promotional increase, effective July 1, of ten percent (10%) of the promoted individual's salary as of the preceding June 30.

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2. In cases where the promotion in rank would result in an increase due to the application of the appropriate salary minimum for the new rank, the promotional increase will be based on the newly applied salary minimum; i.e., the ten percent promotional increase will be applied to the new base salary on July 1.

### D. Miscellaneous

#### 1: Compensation for Summer or Other Third Academic Semester:

- a. Effective the first summer session of 2009, summer or third academic semester teaching shall be paid at a minimum rate of \$1,800 for each semester hour taught.
- b. Effective the first summer session of 2010, the minimum summer compensation or third academic semester rate shall be \$1,900 per semester hour.
- c. Effective the first summer session of 2011, the minimum summer compensation or third academic semester rate shall be \$2,000 per semester hour.
- d. In its discretion, Temple or the Deans of specific schools/colleges may pay any faculty member at a higher rate to secure summer teaching.

#### 3: Compensation for Overload Teaching

- a. Compensation for overload teaching by bargaining unit faculty during the academic year shall be the equivalent of the summer teaching rate.

#### 5. Increased Compensation

- a) Nothing in this contract shall preclude Temple from making additional compensation awards to members of the bargaining unit when Temple deems such additional awards to be in the best interest of the University; and such additional awards shall not be subject to grievance or arbitration. In the event that a salary increase or award is given, Temple shall inform the TAUP in writing within ten (10) days of the decision.
- b) In addition, there shall be a salary adjustment pool whose minimum shall be \$100,000 per year. This pool shall be distributed in accordance with the following procedures. In the event that a salary increase or award is given, Temple shall inform the TAUP in writing within ten (10) days of the decision.
  - i) All funds must be awarded in the budgeted year, and will be paid retroactive to January 1.
  - ii) Bargaining unit members may make written application by October 1 to the Dean of their School or College for salary adjustment for any reason, including equity concerns. The Dean shall inform the applicant of her/his recommendation by December 1. If the applicant is agreeable to the Dean's recommendation, it shall be forwarded directly to the Provost, who shall make the final decision and notify the applicant by February 1.
  - iii) Faculty and Librarians shall have the opportunity to appeal the Dean's recommendation in writing by January 1 to the Vice Provost for Faculty Development and Faculty Affairs, who shall inform the applicant of his/her

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- recommendation by February 1. That recommendation shall be forwarded by March 1 to the Provost, who shall make the final decision and notify the applicant by April 1.
- iv) Academic Professionals shall have the opportunity to appeal the Dean's recommendation in writing by January 1 to the Provost or the Provost's designee, who shall inform the applicant of his/her recommendation by February 1. If appeal has been decided by the Provost's designee, that recommendation shall be forwarded by March 1 to the Provost, who shall notify the applicant within 10 days.
  - v) Recommendations by a Dean must include the following information for each person:
    - (1) Name, date of ranks, date of hire, date of tenure.
    - (2) Curriculum vitae
    - (3) A five-year salary profile for the applicant including explicitly shown merit units awarded.
    - (4) A five-year salary profile for the applicant showing all additional compensation paid by Temple.
    - (5) A profile of the last academic year salaries of the faculty of the applicant's department arranged by rank and time in rank (with last date of promotion).
    - (6) Affirmative Action data from OMCA, and any other pertinent data.
    - (7) Documentation should indicate competitive salaries in private industry and government if appropriate. Other discipline-specific and relevant criteria should be included.
    - (8) Documentation indicating faculty salaries in universities and colleges for the applicant's discipline by rank and geographic region.
    - (9) A recommendation by the dean for the additional compensation including the specific amount proposed and a brief statement about the merits and competitive position of applicants.
    - (10) An additional statement from someone in the discipline may be included.
- c) Decision
- i) The Provost shall decide the amount of salary adjustment to be made.
  - ii) The Provost shall forward her/his decision with copies of the recommendations and documents listed above to TAUP.

Side Letter for Article 20 Financial Emergency: TAUP and Temple shall establish a joint committee to explore ways to reduce expenditures while preserving academic quality.

### **Article 21: Merit Awards**

#### A. Faculty, Librarians, and Academic Professionals

1. Temple shall provide a merit pool calculated as a percentage of the total base compensation for all bargaining unit members on the salary payroll as of the prior June 30. In the case of librarians, a minimum of 25 merit units shall be distributed

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each fiscal year. In the case of Academic Professionals, a minimum of 25 merit units shall be distributed each fiscal year. These merit awards shall be applied retroactively to July 1 of the year in which the award is made and shall become part of base salary.

2. The merit pool for each year shall be the following:

	<b>Merit Pool</b>
7/1/08	1%
7/1/09	1%
7/1/10	1%

3. All bargaining unit members are automatically considered for merit awards. All bargaining unit members shall submit an annual report for the prior year's activities at Temple to the department chair or supervisor no later than October 1 following the end of the academic year. No school or college shall require that annual reports be submitted prior to October 1.
4. Starting July 1, 2009, all bargaining unit members who submit an annual report by October 1 shall receive a 0.25% salary increase effective the preceding July 1.
5. The periods considered for a merit award shall be July 1, 2007-June 30, 2008, July 1, 2008-June 30, 2009, and July 1, 2009-June 30, 2010.

### B. Faculty Merit Awards

1. All faculty members, regardless of classification (tenured, untenured, and nontenure-track alike), are eligible for merit and/or pay for performance awards in all categories of faculty activities.
2. Merit awards shall be given for recognition of exceptional performance of the duties and responsibilities set forth in Article 11 of this agreement for promotion to the faculty member's rank. Specifically, merit awards shall be given principally for outstanding performance in teaching/instruction, for research/scholarship/creative activity, and/or for outstanding performance and service.
3. The merit pool shall be divided into merit units. Each merit unit shall equal \$600. Any fraction of a merit unit remaining in the pool shall be rounded up. When merit is granted, the minimum award shall be one full unit. Additional units may be half (1/2) or whole units.
4. The commencement of the merit process shall be announced by Temple to all faculty members, Department Chairs, and Deans each year.
  - a. Uniform written guidelines governing the criteria and procedures for recommending faculty for merit awards shall be distributed by Temple to all faculty, Department Chairs, and Deans by September 1 of every year. The allocation formula for distributing the merit pool among departments, colleges, and the Provost shall be provided to all faculty along with the guidelines.

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- b. The review process shall proceed as follows:
  - i. There shall be a departmental merit committee which reviews each faculty member's accomplishments. The committee shall be composed of members elected from the department's faculty. In cases where departments are small, the department may request that the College- or School-wide merit committee handle the initial review. The departmental merit committee shall send its findings to the Department Chair by November 1 of each year. The committee will inform each faculty member of its recommendation, including the reasons for the recommendation and, if applicable, the number of merit units recommended.
  - ii. The Department Chair shall review the recommendations of the departmental merit committee and send her/his recommendations to the College- or School-wide merit committee by December 1 of each year. The Department Chair shall inform each faculty member of her/his recommendation, including the reasons for the recommendation and, if applicable, the number of merit units recommended.
  - iii. The College- or School-wide merit committee shall consist of no more than ten members who shall be elected by the College or School Assembly. The committee shall review these recommendations and send its recommendations to the Dean by February 1 of each year. The committee shall inform each faculty member of its recommendation, including the reasons for the recommendation and, if applicable, the number of merit units recommended.
  - iv. The Dean shall prepare her/his recommendations for merit awards, the reasons for which each faculty member is being recommended or not and, if applicable, the number of merit units recommended. Each faculty member shall be notified by the Dean of her/his recommendation by March 1 when the recommendation is forwarded to the Provost or other designated University officer for review and final decision.
  - v. Faculty who have been awarded merit awards shall be informed of the number of merit units and the reasons for which merit is being awarded by the Provost or other designated University officer no later than May 1.
  - vi. At each stage of this process, each faculty member may submit an appeal in writing to the next level.
- c. TAUP shall be provided a list of faculty receiving merit awards no later than May 1. Decisions on the award of merit pay awards by the Provost or other designated University officer shall not be subject to grievance or arbitration.

### C. Librarians

1. Merit awards shall be given for recognition of exceptional performance of the duties and responsibilities set forth in Article 17 of this agreement. Specifically, merit awards shall be given principally for (1) outstanding effectiveness of performance as a librarian; (2) significant continuing professional growth as demonstrated by

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scholarly activities such as continuing education, participation in professional activities, contributions to the profession, and publication of reports, articles or other works pertinent to university libraries and librarianship; and (3) effectiveness of service to the library and/or Temple.

2. The merit pool shall be divided into merit units. Each merit unit shall equal \$350 dollars. Any fraction of a merit unit remaining in the pool shall be rounded up. When merit is granted, the minimum award shall be one full unit. Additional units may be half (1/2) or whole units.
3. The commencement of the nominating process shall be announced by Temple to all librarians, their supervisors, and the Dean of University Libraries.
  - a. Uniform written guidelines governing the criteria for recommending faculty for merit awards shall be distributed by Temple to all librarians, their supervisors, and the Dean of University Libraries by September 1<sup>st</sup> of every year.
  - b. The review process shall proceed as follows:
    - i. The librarian's supervisor reviews the accomplishments of each librarian in her/his department. The supervisor shall send her/his recommendation to the Library merit committee by November 1<sup>st</sup> of each year. The supervisor shall inform each librarian of her/his recommendation, including the reasons for the recommendation and, if applicable, the number of merit units recommended.
    - ii. The library merit committee shall consist of no more than six members who shall be elected from the library Assembly's bargaining unit members. The committee shall review the supervisors' recommendations and send its recommendations to the Dean by February 1<sup>st</sup> of each year. The committee shall inform each librarian of its recommendation, including the reasons for the recommendation and, if applicable, the number of merit units recommended.
    - iii. The Dean shall prepare her/his recommendations for merit awards, the reasons for which each librarian is being recommended or not and, if applicable, the number of merit units recommended. Each librarian shall be notified by the Dean of her/his recommendation by March 1<sup>st</sup> when the recommendation is forwarded to the Provost or other designated University officer for review and final decision.
    - iv. Librarians who have been awarded merit awards shall be informed of the number of merit units and the reasons for which merit is being awarded by the Provost or other designated University officer no later than May 1<sup>st</sup>. At each stage of this process, each faculty member may submit an appeal in writing to the next level.
  - c. TAUP shall be provided a list of librarians receiving merit awards no later than May 1<sup>st</sup>. Decisions on the award of merit pay awards by the Provost or other designated University officer shall not be subject to grievance or arbitration.
  - d.

### D. Academic Professionals

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1. Merit awards shall be given for recognition of exceptional performance of the duties and responsibilities set forth in Article 18 of this agreement. Specifically merit awards shall be given principally for (1) outstanding effectiveness of performance as an academic professional; (2) significant continuing professional growth as demonstrated by scholarly activities such as continuing education, participation in professional activities, contributions to the profession, and publication of reports, articles or other works pertinent to employment as an academic professional; and (3) effectiveness of service to the College or School and/or Temple.
  2. The merit pool shall be divided into merit units. Each merit unit shall equal \$350 dollars. Any fraction of a merit unit remaining in the pool shall be rounded up. When merit is granted, the minimum award shall be one full unit. Additional units may be half (1/2) or whole units.
  3. The commencement of the nominating process shall be announced by Temple to all academic professionals, and their department heads and/or supervisors.
    - a. Uniform written guidelines governing the criteria for recommending academic professionals for merit awards shall be distributed by Temple to all academic professionals and their supervisors each year.
    - b. The review process shall proceed as follows:
      - i. The Dean, Director or other senior supervisor shall consult with the immediate supervisor about the nomination of persons for merit salary increases. After consulting with the supervisors, the Dean, Director or other senior supervisor shall prepare a list of his/her recommendations for merit awards, the reasons for which they are recommended or not, and, if applicable, the number of merit units for which each person is recommended. Each academic professional be notified of the recommendation at the time it is forwarded to the Provost or other designated University officer.
      - ii. The list of academic professionals proposed for merit awards and the amount of each merit award recommendation shall be forwarded to the Provost or other designated University officer for review and final decision. Academic professionals who have been awarded merit awards shall be informed of the number of merit units and the reasons for which merit is being awarded by the Provost or other designated University officer no later than May 1st.
    - c. TAUP shall be provided a list of academic professionals receiving merit awards no later than May 1st. Decisions on the award of merit pay awards by the Provost or other designated University officer shall not be subject to grievance or arbitration.
- E. TAUP and Temple shall establish a joint committee to work together in establishing guidelines for a pay for performance plan.
1. These guidelines shall be presented for ratification to TAUP members by September 30, 2009.

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2. Current merit guidelines shall be used until the TAUP members ratify the new pay for performance guidelines.
3. If the pay for performance guidelines are not ratified, current merit pay guidelines shall continue.

### **Article 22: Benefits:**

#### L. Pensions

##### 3. Non-Tenure-Track Faculty

- a. Eligibility and Enrollment: Eligible non-tenure-track faculty members may elect to participate in a defined contribution plan. Non-tenure-track faculty members shall become eligible to participate as of the July 1 or January 1 following the completion of one year of service. Each eligible non-tenure-track faculty member may enroll in any June (for July 1 participation) or any December (for January participation).
- b. Benefit: An eligible faculty member who has elected to participate shall contribute 4.5% of base salary and shall receive a matching employer contribution of 4.5% of base salary.

### **Article 23 University Supported Research**

#### A. Sabbaticals

1. Sabbaticals shall be authorized annually for the tenured and tenure-track faculty at the rate of one (1) per seven (7) faculty members or fraction thereof. The Provost may increase the number of available sabbaticals in his/her sole discretion. There shall be no limit on number of sabbaticals granted in any department. If all leaves for eligible faculty are not used, those with fewer than 6 years accumulated after last leave will be considered.
2. The Provost shall will notify the faculty annually of the number of sabbaticals available and encourage applications for sabbaticals.
3. The purpose of sabbaticals shall be to pursue professional development, to conduct research and/or creative activities, and/or to develop methods and materials to improve teaching and curricula with the outcome of increasing the individual's future contribution to the University. In awarding sabbaticals, Temple may take into account the applicant's recent performance in scholarship and, where the sabbaticals propose significant innovations in teaching, recent performance in teaching. The products resulting from previous sabbaticals and any reports on those sabbaticals may also be considered in evaluating applications for sabbaticals. Sabbaticals are awarded only for meritorious proposals, and there is no duty by Temple to award all sabbaticals if there are not a sufficient number of meritorious proposals.
4. The appropriate college committee shall review all applications for sabbaticals and forward all applications and recommendations to the Dean. The Collegial Assembly shall specify the appropriate committee to review sabbatical applications.
5. Applications for sabbaticals shall be forwarded to the Dean of each college following review by the appropriate committee in the college. The Dean shall forward to the

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- Provost or other designated University officer all sabbatical applications that meet the criteria set forth above along with his/her recommendations.
6. The Provost or other designated University officer will consult with a University Sabbatical Committee consisting of (12) faculty members from the TAUP bargaining unit. Six (6) members shall be selected by the Provost and six (6) members shall be selected by the Faculty Senate. To maintain disciplinary breadth and diversity on the committee, no more than one faculty member per school or college may be selected by the Faculty Senate to serve at one time. The committee shall recommend to the Provost or other designated University officer which sabbaticals shall be awarded. The Provost shall then award sabbaticals in his/her discretion.
  7. A faculty member on the tenure track, but not yet tenured, may apply for a sabbatical to be taken in the fourth or fifth year of full-time service at Temple. Temple shall endeavor to award sabbaticals to tenure-track faculty in at least the proportion that eligible tenure-track faculty are to the tenured and tenure-track faculty group when the number of sabbaticals is calculated each year.
  8. Temple shall endeavor to award all the sabbaticals that are available in each year, but it is not obligated to award sabbaticals that do not meet the criteria stated in paragraph 2.
  9. A tenured or tenure-track faculty member who receives a sabbatical shall not be eligible to apply for another sabbatical until once he/she has accrued six additional years of service at Temple, not including any unpaid or paid leaves
  10. A tenured or tenure-track faculty member who has accrued the required years of service to earn a sabbatical, but would like to postpone his/her sabbatical or application for sabbatical for up to 2 years, may make a request in writing to his/her Dean. If Temple agrees to the postponement, the year of the postponement shall continue to accrue toward future sabbaticals. The Dean may also request that a faculty member who has accrued the required years of service to earn a sabbatical postpone his or her sabbatical for up to 2 years during which time will continue to accrue toward future sabbaticals.
  11. Sabbaticals taken by tenure-track faculty will not stop the tenure clock.
  12. A faculty member on sabbatical for a full year shall receive sixty-five percent (65%) of annual salary for one year and all usual benefits. With the approval of the Dean, faculty members on a full-year sabbatical are permitted to earn from external sources an amount equivalent to thirty-five percent (35%) of their annual University salary. Faculty are not permitted to earn more than one-hundred percent (100%) of their annual University salary while on full-year sabbatical except with the written approval of the Provost.
  13. A faculty member on sabbatical for one semester shall receive full salary and all usual benefits. With the prior approval of the Dean, a faculty member on one semester sabbatical shall be permitted to spend one day per calendar week engaged in external consultation. Such consultation shall be conducted in accordance with the outside compensation provisions of this Agreement.
  14. Nontenure-track faculty who has completed ten (10) years of full-time service at Temple shall be eligible to be considered for a sabbatical. In each year, the number of sabbaticals made available shall be equal to ten (10%) percent authorized at the rate of one (1) per nine (9) of the eligible nontenure-track faculty members. No nontenure-track

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faculty member shall be eligible for an additional sabbatical until he/she has completed ten (10) additional years of full-time service, except under the following circumstances: if all leaves for eligible faculty are not used, those with fewer than 10 years accumulated after last leave will be considered.

15. Sabbaticals shall be awarded to nontenure-track faculty through the same process and based on the same criteria as for tenured and tenure-track faculty.
16. The percentage of salary for sabbatical to nontenure-track faculty shall be the same as for semester sabbaticals and for academic year sabbaticals for tenured and tenure-track faculty. Sabbaticals will include all usual benefits for nontenure-track faculty.
17. No sabbatical from the pool available to tenured and tenure-track faculty shall be awarded to nontenure-track faculty, and no sabbaticals from the pool available to nontenure-track faculty shall be awarded to a tenured or tenure-track faculty member.
18. Any faculty member on sabbatical may supplement the compensation received from Temple with fellowships or grants held through Temple that support the project or activities set forth in the faculty member's sabbatical proposal, but any such compensation shall conform to the regulations of the fellowship or granting agency and shall not in combination with the compensation from the sabbatical, exceed 100 percent (100%) of the regular Temple salary of the faculty member. Except as provided in the preceding provisions, a faculty member may not, without approval of the Provost or other designated officer, engage in activities that produce earned income, either from services rendered or otherwise, while on sabbatical from Temple. The Provost or other designated officer shall issue guidelines setting forth the circumstances under which a faculty member will be permitted to receive such earned income while on sabbatical. As a general principle, the faculty member is expected while on sabbatical to devote his/her full time and effort to carrying out the project described in his/her sabbatical proposal.

### **B. Summer Research Awards**

There shall be 35 awards annually, with preference given to tenure-track faculty. The stipend for summer 2009 shall be \$8000 and \$8500 for summer 2010 and \$9000 for summer 2011. The selection process shall remain unchanged.

### **C. Prestigious Fellowships and Awards**

1. When a faculty member receives a prestigious external fellowship, or award such as Fulbright, Guggenheim and/or Pew and Temple grants an unpaid leave for the purpose of pursuing the activities described in this award, Temple shall provide full benefits throughout the leave.
2. In cases where such fellowships or awards cover only part of the faculty member's salary, Temple shall pay as a supplement an amount of money to bring the faculty member's compensation to 100% of his/her base pay for the academic year in which the leave is taken.
3. Faculty members granted leaves as described in Section C will be ineligible to take additional leaves under this article for a period of one (1) year. During this period, time will continue to accrue toward future leaves.

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4. A faculty member who is granted a leave as described in Section C will be required to return to his/her position at TU for at least 1 year.

D. Faculty members who are granted leaves or awards described in this article will be required to return to their positions at Temple for at least one year.