



TEMPLE
University

**COLLECTIVE BARGAINING
AGREEMENT**

BETWEEN

**TEMPLE UNIVERSITY – OF THE
COMMONWEALTH SYSTEM OF
HIGHER EDUCATION**

AND

**TEMPLE ASSOCIATION
OF UNIVERSITY PROFESSIONALS,
AMERICAN FEDERATION OF
TEACHERS, AFL-CIO
LOCAL 4531**

OCTOBER 15, 2008 – OCTOBER 15, 2012

TABLE OF CONTENTS

PREAMBLE	3
ARTICLE 1: Recognition.....	3
ARTICLE 2: Definitions	4
ARTICLE 3: No Discrimination	6
ARTICLE 4: Affirmative Action.....	6
ARTICLE 5: Rights of Temple	6
ARTICLE 6: Rights of TAUP	8
ARTICLE 7: Deduction of Dues	9
ARTICLE 8: Grievance Procedure.....	10
ARTICLE 9: Arbitration Procedure	12
ARTICLE 10: No Strike/No Lockout.....	12
ARTICLE 11: Promotion and Tenure Standards and Procedures for Tenure-Track Faculty	14
ARTICLE 12: Termination of Service for Faculty and Discipline of Faculty for Just Cause	27
ARTICLE 13: Retrenchment.....	34
ARTICLE 14: Renewal or Nonrenewal of Tenure-Track and Nontenure-Track Faculty Appointments.....	39
ARTICLE 15: Nontenure-Track Faculty Classifications	39
ARTICLE 16: Department Chairs	42
ARTICLE 17: Appointment, Promotion and Termination of Service of Librarians.....	44
ARTICLE 18: Appointment, Promotion and Termination of Service of Academic Professionals.....	51
ARTICLE 19: Workload	55
ARTICLE 20: Salaries.....	58
ARTICLE 21: Salary Increases for Faculty, Librarians and Academic Professionals.....	62

266-E (PERA-R-1123-E) of July 14, 1987, as amended in Case No. PERA-U-96-265-E (PERA-R-1123-E) of May 20, 1990, as the exclusive

ARTICLE 22: Benefits	68
ARTICLE 23: University Supported Research	83
ARTICLE 24: Personnel Files	88
ARTICLE 25: Safety and Health	89
ARTICLE 26: Maintenance of Standards	90
ARTICLE 27: Meet and Discuss Conference	90
ARTICLE 28: Agreement Construction	90
ARTICLE 29: Savings Clause	91
ARTICLE 30: Duration of Agreement	91
SIDE LETTERS	93
1. Health Insurance	93
2. Intellectual Property	93
3. Union Business	93
4. Office Space	93
5. Long-Term Disability	93
6. Timetable for Receipt of Information	94
7. Joint Statement of Commitment to Tenure and the Tenure-Track	94
8. Tenure and Promotion Guidelines	94
9. Non-Waiver of Positions on Grievance/Arbitration of Denial of Promotion	94
10. Part-Time Faculty	95
11. Insubordination	95
12. Librarian Probation and Promotion	95
13. Work Option for Librarians	95
14. Librarians Hired for Fixed Periods of Time	96
15. Employee Orientations	97
16. Work-Life Balance: Nontenure-Track Faculty	97
17. Work-Life Balance: Tenure-Track Faculty	98
18. Life Insurance	98
INDEX	100

PREAMBLE

Temple and TAUP endorse the following:

This Agreement, which is between Temple and TAUP, representing faculty, academic professionals and librarians, seeks to further academic excellence, assure fair and reasonable conditions of employment, and promote procedures for peaceful solution of disputes.

The teacher is entitled to full freedom in research and in the publication of the results, subject to the adequate performance of his/her other academic duties; but research for pecuniary return should be based upon an understanding with the authorities of the institution.

The teacher is entitled to freedom in the classroom in discussing his/her subject, but he/she should be careful not to introduce into his/her teaching controversial matter which has no relation to his/her subject. Limitations of academic freedom because of religious or other aims of the institution should be clearly stated in writing at the time of the appointment.

The college or university teacher is a citizen, a member of a learned profession and an academic leader in an educational institution. When he/she speaks or writes as a citizen, he/she should be free from institutional censorship or discipline; but his/her special position in the community imposes special obligations. As a scholar and an academic leader, he/she should remember that the public may judge his/her profession and his/her institution by his/her utterances. Hence, he/she should at all times be accurate, should exercise appropriate restraint, should show respect for the opinions of others, and should make every effort to indicate that he/she is not speaking for the institution.

**ARTICLE 1
RECOGNITION**

A. Temple recognizes TAUP, pursuant to the final certification of the Pennsylvania Labor Relations Board of July 5, 1973 in Case Nos. PERA-R-1123-E and PERA-R-1137-E, as amended in Case No. PERA-U-87-266-E (PERA-R-1123-E) of July 14, 1987, as amended in Case No. PERA-U-90-265-E (PERA-R-1123-E) of May 20, 1990, as the exclusive

collective bargaining representative of the employees of Temple University in the unit described below for the purpose of negotiating with respect to wage, hours, and other terms and conditions of employment.

B. All full-time faculty, including Department Chairpersons, employed at Temple University, full-time professional librarians on the Paley Library budget or in other colleges and schools included in the bargaining unit, and non-faculty academic professionals as defined in ARTICLE 18 of this Agreement. Excluded from the bargaining unit: Deans, Associate Deans, Assistant Deans, members of the faculty, librarians and support professionals serving outside the continental United States, the School of Medicine, the James E. Beasley School of Law, the School of Dentistry and Hospital of Temple University, and the School of Podiatric Medicine of Temple University, and all other non-faculty and professional employees, including teaching associates and graduate assistants, computer activity personnel and management, supervisors, and first-level supervisors and confidential employees as defined in Act 195.

ARTICLE 2 DEFINITIONS

A. University: Temple University - Of The Commonwealth System of Higher Education.

B. Temple: The Board of Trustees, President and University Officers, Deans, and such other supervisors and managerial personnel as defined in the Public Employee Relations Act 195. It shall not include Department Chairs.

C. Board of Trustees: The Board of Trustees of Temple University - Of the Commonwealth System of Higher Education.

D. President: The President of Temple University - Of The Commonwealth System of Higher Education.

E. College or School: The terms are interchangeable and refer to the colleges and schools now included in TAUP bargaining unit, namely:

Art, Tyler School of
Business and Management, Fox School of

Communications and Theater, School of
Education, College of
Engineering, College of
Health Professions and Social Work, College of
Liberal Arts, College of
Music and Dance, Esther Boyer College of
Pharmacy, School of
Science and Technology, College of
Tourism and Hospitality Management, School of

F. Dean: The chief executive officer of each College or School of Temple University.

G. TAUP: The Temple Association of University Professionals, American Federation of Teachers, Local #4531, AFL-CIO.

H. Members of the Bargaining Unit: Faculty, librarians, and academic professionals represented by TAUP for purposes of collective bargaining.

I. Department Chair: A faculty member who is the designated head of an academic department or degree-granting program.

J. Faculty: All full-time employees of Temple University in a full-time faculty classification (such as, but not limited to, faculty who are tenured or on the tenure-track, Research Faculty, Clinician Educator Faculty, Practice Faculty, Teaching/Instruction Faculty) in a College or School included in the bargaining unit.

K. Tenured and Tenure-Track Faculty: All faculty who are tenured or by the terms of their appointment by the President are eligible for tenure.

L. Nontenure-Track Faculty: All full-time faculty who are classified as Lecturers, Researchers, Practice Faculty, Teaching/Instructional Faculty or Clinician Educators.

M. Librarians: All full-time professional librarians functioning primarily as librarians, on the Paley Library budget or in a College or School included in the bargaining unit.

N. Academic Professionals: Full-time employees whose work is necessary or adjunct to the teaching of students or to research functions of the University.

O. Gender: The masculine, feminine, and neuter gender as used in this agreement import one another. The singular number, as used in this Agreement, shall import the plural whenever applicable.

P. Designated University officer/administrative officer: Any Temple administrative employee designated by the President.

ARTICLE 3 NO DISCRIMINATION

A. Neither Temple nor TAUP shall discriminate against or in favor of any employee because of race, color, creed, marital status, sexual orientation, national origin, political belief, political affiliation, sex, age, TAUP membership or non-membership. Neither party shall discriminate against an individual with a disability who, with reasonable accommodation, can perform the essential functions of the job or activity in question.

ARTICLE 4 AFFIRMATIVE ACTION

A. Temple and TAUP agree to cooperate in the implementation of the Affirmative Action Program.

B. Temple University and TAUP agree to establish a joint committee to discuss diversity related issues pertaining to the bargaining unit.

ARTICLE 5 RIGHTS OF TEMPLE

A. Nothing contained herein shall limit or be construed to limit the powers, rights and authority of the Board of Trustees of the University for the entire management, control and conduct of the instructional, administrative and financial affairs of the University pursuant to the Temple University – Commonwealth Act, 24 P.S. §2510-1 et seq.

B. In accordance with the rights established by Act 195, the University shall not be required to bargain over matters of inherent managerial policy, which shall include but shall not be limited to such areas of discretion or policy as the functions and programs of the University, standards of services, its overall budget, utilization of technology, the organizational structure, and selection and direction of personnel.

C. The management, administration and control of the University's operations, programs, activities, mission and resources, and the direction of its working forces including, but not limited to, the right to plan, direct and control all duties and functions performed by members of the bargaining unit herein involved; the right to hire, discipline or discharge employees for cause, to transfer, promote or relieve employees from duty because of lack of work or other reasons; the maintenance of discipline, order and efficiency; the right to establish, revise, maintain and enforce reasonable work standards and schedules; to make from time to time and enforce reasonable work rules; to introduce new work methods and facilities; to subcontract all or any portion of its operation (provided that if the University proposes to subcontract bargaining unit work, TAUP is given the opportunity to meet and discuss the proposed subcontracting, which discussions shall be concluded within thirty (30) working days following the initial notice to TAUP) and to change or eliminate existing methods whether or not the same causes any reduction in the working force; or to reorganize or combine operations with any consequent reduction or other changes in the working force, is vested exclusively in the University, provided that this section will not be used for the purpose of discriminating against any employee on account of membership in the bargaining unit.

D. The above enumeration of management rights is not exhaustive and does not exclude other management rights not specified herein, nor shall the exercise or non-exercise of rights constitute a waiver of such rights by the University. The parties recognize that none of the management rights enumerated above or any other management rights shall be subjects of bargaining or grievances.

E. The rights of management are limited only as expressly limited by the language of this Agreement, notwithstanding (or without regard to) any practices or customs that may now or in the future exist.

F. The enumeration of certain rights and privileges of faculty members in this Agreement shall not be construed to deny or diminish the existing rights, privileges, and responsibilities of faculty members to participate in the formulation and recommendation of educational policy within the University and its schools and colleges, as approved by Temple and its Board of Trustees.

ARTICLE 6 RIGHTS OF TAUP

A. TAUP shall have reasonable access to University premises upon application to, and approval from, the appropriate Temple authority on the same basis as granted to any other non-student groups within Temple for the purpose of administering this Agreement.

B. TAUP shall have the right to post official TAUP communications on one (1) approved bulletin board in the principal faculty office building of each College or School in the Bargaining Unit. TAUP shall have the right to use at no cost the campus mail and mailboxes for distribution of its official communications.

C. Temple shall make available to TAUP, upon reasonable notice, information and data concerning the wages, hours, and terms and conditions of employment of members of the bargaining unit including, but not limited to, the following:

1. Salary and seniority information for all members of the bargaining unit including name, salary, department, college, rank, date of promotion to present rank, date of tenure, and mode of payment (fiscal 12, academic 10, academic 12). Such information shall be supplied at least annually on November 1 (based on the September payroll).

2. Benefits information for members of the bargaining unit, including the numbers of members participating in each benefit and the total level of participation by members of the bargaining unit.

D. Temple shall reproduce and provide 2,000 copies of this Agreement to TAUP within 60 days following ratification of the Agreement. The cost of such reproduction shall be borne equally by the parties.

E. TAUP shall have the right to use the duplicating services at the established standard rate.

F. Temple shall allow reasonable time for librarians and academic professionals for the processing of their grievances during normal working hours.

G. Participation in TAUP Activities

1. Since TAUP has historically been a professional organization, participation in TAUP activities is eligible for consideration when making personnel-related decisions.

H. Temple shall provide Paley Library with at least one copy of the detailed computerized version of the Temple budget (presently referred to as the B2 budget) as well as the overall final budget for each year and the breakdown of income for each year as soon as each is available.

I. Temple shall list the address, two TAUP telephone numbers, and the email address for the local office in both the printed and on-line (electronic version) of the University's Telephone Directory.

ARTICLE 7 DEDUCTION OF DUES

A. Temple, subject to any applicable law, shall deduct from the salary of any bargaining unit member who authorizes such deduction, TAUP established monthly dues as certified by TAUP. Any such employee wishing to begin dues deduction shall submit a properly completed authorization card to TAUP, the original of which will be forwarded to Temple's Department of Human Resources.

B. A facsimile of the authorization card to be used for the deduction shall be as follows:

To Temple University:

I, the undersigned, a member of the TAUP bargaining unit, authorize Temple to deduct all dues payments authorized by the TAUP Constitution and By-Laws from my salary and to remit the amounts so deducted to TAUP.

This authorization will remain in full force and effect until revoked by me, in writing, by providing written instruction to cease payroll deductions to Temple's Human Resources Department, with a copy to TAUP, during the first fifteen (15) days of October in any calendar year.

NAME:	EMPLOYEE #
COLLEGE:	DEPARTMENT:
SIGNATURE:	DATE:

C. Within 15 days after the close of any payroll period, Temple shall forward to TAUP (1) the dues deducted in the last payroll period and (2) a list showing the names of bargaining unit members who authorized such deductions and the amounts deducted.

D. TAUP shall be authorized to collect a fair share fee from all members of the bargaining unit, calculated in accordance with applicable law, if it obtains and maintains seventy percent (70%) of the bargaining unit as dues-paying members of TAUP as measured on December 1 of each calendar year. If TAUP fails to maintain seventy percent (70%) of the bargaining unit as dues-paying members of TAUP as measured on December 1 of each calendar year, its authorization to collect a fair share fee shall cease.

E. TAUP shall defend, indemnify, and save harmless Temple, and its employees, from any and all liability, costs, and expenses (including attorney's fees) arising as a result of the deduction of TAUP dues and fees.

**ARTICLE 8
GRIEVANCE PROCEDURE**

A. Temple and TAUP agree that they will use their best efforts to encourage the informal and prompt settlement of grievances. In the event a grievance may arise between Temple and TAUP, involving the interpretation and application of this Agreement, a grievance procedure is described below for the orderly resolution of such grievances. TAUP shall be notified in advance and shall have the right to be present at

meetings specified in all steps. The grievant shall have the right of TAUP representation, or may be self-represented.

1. Step 1. Within twenty (20) working days after the grievance occurs or after the grievance should have been known, it shall be presented informally in writing to the Dean,* with copies to the Provost and TAUP. The Dean shall discuss and answer the informal presentation in writing within fifteen (15) working days after receiving the grievance, with copies to the Provost, the Human Resources Department, and TAUP.

2. Step 2. A dispute unresolved in Step 1 may then be presented in writing to the Provost or other designated University officer within ten (10) working days of the grievant's receipt of the response or lack thereof in Step 1. A grievance so presented in Step 2 shall be answered by Temple in writing within twenty (20) working days after its presentation.

B. Failure on the part of Temple to answer a grievance at any step within the specified time limits shall not be deemed acquiescence thereto and the grievant or TAUP may proceed to the next step. If the failure to respond occurs at Step 2, the arbitration provisions of this Agreement may be utilized. Failure by the grievant to appeal to the next step within the specified time limit shall be deemed acceptance of the decision rendered at that step.

C. A grievance on behalf of Temple may be presented initially at Step 2 by notice in writing addressed to TAUP at its offices.

D. All time limits herein specified shall be deemed to be exclusive of Saturdays, Sundays, legal holidays, and Temple declared holidays.

E. A grievance which affects two (2) or more employees may initially be presented at Step 2 by TAUP. The grievance shall then be processed in accordance with the grievance procedure.

F. The parties may mutually agree in writing to suspend the time limits.

*Or their supervisor for librarians and academic professionals.

**ARTICLE 9
ARBITRATION**

- A. A grievance which has not been resolved may within twenty (20) working days after completion of the final step of the grievance procedure be referred to the American Arbitration Association for resolution under the Voluntary Labor Arbitration Rules then in force of the American Arbitration Association.
- B. The language used in this Agreement shall be binding upon the arbitrator. The arbitrator shall not have any authority to add to, subtract from, or otherwise modify any of the terms or provisions of this Agreement.
- C. The decision of the arbitrator shall be final and binding.
- D. The costs of arbitration shall be shared equally by Temple and TAUP. Such costs shall be limited to the Arbitrator's fee and expenses and the charges of the American Arbitration Association.
- E. The parties agree that in some instances it is in their respective best interests to expedite certain grievances that are submitted to arbitration. Either Temple or TAUP may request expedited arbitration. In an expedited arbitration hearing, upon request by either party, the American Arbitration Association shall be asked to appoint, within ten (10) business days from such request, an arbitrator, who will then hear the case within four (4) weeks of appointment and render an Award and Opinion not later than four (4) weeks after the close of the hearing.

**ARTICLE 10
NO STRIKE/NO LOCKOUT**

- A. During this Agreement, TAUP, its officers, agents, representatives and members, shall not in any way, directly or indirectly, authorize, assist, encourage, participate in, condone, or sanction any strike, sit-down, slow-down, cessation, stoppage or picketing, where the object of such picketing is to cause any employee of Temple University to strike, slow-down, cease, stop or interrupt his or her work or otherwise boycott, or otherwise interfere with the operations of Temple University or to cause an employee to strike, slow-down, cease providing services to, or interrupt or interfere with the operations of Temple University or any

other Temple-affiliated health care entity or provider, or any other educational institution or other Temple facility.

B. TAUP, its officers, agents, representatives and members, shall not in any way, directly or indirectly, authorize, assist, encourage, participate in, condone, or sanction any picketing (as defined in Section A) strike, sit-down, slow-down, cessation, stoppage or interruption of work, boycott or otherwise interfere with the operations of Temple University or any Temple-affiliated health care entity or provider, or any other educational institution or other Temple facility, where such picketing, strike, sit-down, slow-down, cessation or stoppage or interruption of work, boycott or interference with the operations is in violation of a collective bargaining agreement covering the employees of the other Temple facility or is otherwise illegal.

C. In addition to any other liability, remedy or right provided by applicable law or statute, should a picket (as defined in Section A), strike, sit-down, sit-in, slow-down, cessation or stoppage or interruption of work, boycott, or other interference with the operations of Temple University or any Temple-affiliated health care entity or provider, or any other educational institution or other Temple facility during the term of this Agreement occur, TAUP, within twenty-four (24) hours of a request by Temple University, shall:

1. Publicly disavow such action by the TAUP Bargaining Unit Members.
2. Advise Temple's Human Resources Department in writing that such action by the TAUP Bargaining Unit Members has not been called or sanctioned by TAUP.
3. Notify the TAUP Bargaining Unit Members of its disapproval of such action and instruct such TAUP Bargaining Unit Members to cease such action and return to work immediately.
4. Post notices at the bulletin board described in Article 6, Section B advising that it disapproves of such action and instructing the TAUP Bargaining Unit Members to return to work immediately.

D. Temple will not lock out TAUP Bargaining Unit Members during the term of this Agreement.

ARTICLE II
PROMOTION AND TENURE STANDARDS AND PROCEDURES
FOR TENURE-TRACK FACULTY

A. The following standards shall apply to applications for promotion and tenure by members of the faculty.

1. Tenure-track faculty members are eligible to apply for promotion and/or tenure at any time.

B. Promotion Standards

1. Consideration for promotion shall be based primarily on outstanding performance and continuing promise of outstanding performance as a faculty member. Teaching/instruction and research/scholarship/creative activity shall be primary in this evaluation. University service, service to the profession/discipline, and discipline-based community service shall be secondary. The standard of outstanding performance shall be informed by standards for promotion to the same rank at other national research universities appropriate to the discipline under consideration. Promotion to any rank, thus, is a recognition of past performance and an assessment that the faculty member is capable of greater responsibilities and accomplishments. Personal and professional integrity are assumed. The ultimate goal of all promotions is to build the best possible faculty for the University.

C. Promotion Procedures

1. Levels of review for promotion shall include in consecutive order: a departmental committee; the Department Chair; a College or School committee; the Dean; the Council of Deans and/or the University Tenure and Promotion Advisory Committee; and the Provost. Recommendations for promotion are made to the President, who has the authority to promote faculty.

2. The University Tenure and Promotion Advisory Committee

a. 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) members, as

follows: Half shall be faculty members from the TAUP bargaining unit selected by the Faculty Senate; the remaining members shall be faculty members from the TAUP bargaining unit selected by the Provost, except that in the Provost's discretion up to two may be administrators with faculty rank. Committee votes will be conducted by secret ballot. 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.

b. Committee membership shall be increased by an additional two (2) members if one additional non-bargaining unit college or school comes within the jurisdiction of the Committee. One of these faculty members will be selected by the Faculty Senate, the other will be selected by the Provost. No further members shall be added, however, if more than one additional college or school comes within the jurisdiction of the Committee. Committee membership shall be limited to no more than eighteen (18) members.

3. Eligibility to Serve on Promotion Committees

a. Only individuals holding tenure at Temple are eligible to serve on promotion committees. Only individuals holding the rank of Professor at Temple may serve as Faculty Senate representatives on the University Tenure and Promotion Advisory Committee or participate in committee deliberations regarding the promotion of a faculty member to the rank of Professor. A faculty member is only eligible to be present, participate in deliberations or vote at one (1) of the following levels of the promotion process: as a member of a departmental committee; as a Department Chair, as a member of the College or School committee; or as a member of the University Tenure and Promotion Advisory Committee. Individuals being considered for promotion are ineligible to participate in deliberations regarding promotions in the year in which their candidacy is being considered.

b. At the departmental committee level, in addition to student feedback forms, each department will solicit student input in tenure and promotion decisions.

4. Selection of Departmental and College Promotion Committees

a. All departmental and College or School promotion committees must be comprised of at least three (3) faculty members. If a department or College or School has fewer than three (3) faculty members eligible to serve on the department or College or School committee, the Dean may appoint additional persons to serve following consultation with the executive committee, dean's advisory committee, or equivalent body in the College or School. Administrators are not eligible to serve on these committees. Should the Dean appoint additional persons from outside the Department or School or College, he/she shall notify the candidates and the school or college committee in writing as to who has been appointed. Such notice will take place prior to any review, deliberation or action by the promotion committee with respect to that individual or individuals.

b. Only individuals who hold tenure-track appointments or who are tenured may participate in the selection of the faculty members of departmental and College or School promotion committees or nominees for the University Tenure and Promotion Advisory Committee.

c. A department or College or School shall not be precluded from providing in its bylaws that the same committee shall serve as the promotion committee and the tenure committee.

5. Independent External Evaluations of Candidates for Promotion

a. Assessment of the credentials of the candidate shall include written letters of evaluation from individuals from outside the University who are qualified to assess the credentials of the candidate for promotion. A preponderance of these letters shall be obtained from persons who have not worked or collaborated with the candidate. A candidate for promotion and the departmental promotion committee shall each separately submit lists to the Dean that contain the names and professional affiliations of persons whom they recommend to be external evaluators. After review of these recommendations, the Dean may, in his/her discretion, add additional evaluators to the lists. All external evaluation letters received shall be part of the individual's dossier.

6. Documentation of Recommendations Related to Promotion and Tenure

a. At each level of review, recommendations for promotion and tenure are to be made separately. Each recommendation shall provide an evaluation for teaching/instruction, for research/scholarship/creative activity and for service. These evaluations, along with the votes and reports of the department, College or School, and the Council of Deans and/or the University Promotion and Tenure Advisory committees, and the recommendations of the Department Chair, the Dean and the Provost or other designated University officer, shall be recorded on a memorandum of transmittal. At each step during consideration for promotion, candidates shall receive copies of the memoranda of transmittal when they are forwarded by the Department Committee, Chair, College or School Committee, Dean, the Council of Deans and/or the University Tenure and Promotion Advisory Committee and the Provost or other designated University officer.

7. Sequence for Promotion Evaluation Process

a. At each level of review, the candidate shall have the opportunity to communicate in writing to the individual or committee receiving the letter of transmittal from the previous level, to provide his/her perspective on the previous level's review and recommendation. Except in cases in which good cause is shown, the candidate must provide any such communication to the individual or committee within ten (10) days of the date of the relevant transmittal.

b. Initial consideration of promotion cases shall be at the departmental level through a departmental committee. The departmental committee shall report its recommendations to the Department Chair.

c. Following action by the departmental committee, the Department Chair shall:

i. Make an independent recommendation on each promotion case and communicate this recommendation to the departmental committee.

ii. Inform the individual faculty member of the Department Chair's and departmental recommendation.

iii. Transmit all recommendations of the departmental committee and the Department Chair to the College or School level for consideration.

d. Promotion decisions are next considered by an appropriate College or School committee having responsibility for promotion matters and by the Dean.

e. Following consideration at the College or School level, the Dean shall:

i. Make an independent recommendation on each promotion case and communicate this recommendation to the appropriate committee of the College or School.

ii. Inform the individual faculty member of the Dean's and the college's recommendation.

iii. Transmit all recommendations to the Provost or other designated University officer.

f. On receipt of the recommendations on promotion from the Deans, the Office of the Provost shall submit all materials relating to promotion in which all recommending agencies and individuals at prior levels have made a positive recommendation to the Council of Deans for review and recommendation. In its discretion, the Council of Deans may refer any such cases to the University Tenure and Promotion Advisory Committee for its review and recommendation. In cases in which any of the committees or individuals below have not made a positive recommendation, the Provost will refer the case directly to the University Tenure and Promotion Advisory Committee for review and recommendation. Following recommendations by the University Tenure and Promotion Advisory Committee or the Council of Deans in cases which are not referred to the University Tenure and Promotion Advisory Committee, the Provost or other designated University officer shall separately make a recommendation.

g. All such recommendations on promotion shall be forwarded by the Provost to the President for his/her review and action.

h. All those who have been formally considered shall be informed by the President whether they have been granted promotion.

i. Any faculty member who believes that his/her procedural rights pertaining to the promotion evaluation process have been denied may present a complaint to the Faculty Senate Personnel Committee. In the event promotion is denied, both parties will endeavor to have any appeals processed in an expeditious manner. The Faculty Senate Personnel Committee shall, within ninety (90) days of the filing of an appeal, forward its recommendations to the candidate and to the President or his/her designee.

j. Should the Faculty Senate Personnel Committee fail to act within ninety (90) days, the President may, at his/her discretion, appoint a fact-finder who shall, within forty-five (45) days, forward his/her recommendations to the candidate and the President or his/her designee.

k. The President will reconsider the decision in light of the report of the Faculty Senate Personnel Committee or the fact-finder and make a final decision in the case. The President shall inform the candidate of his/her decision.

D. Tenure Standards

1. Unless a shorter period has been agreed upon in the letter of appointment, a faculty member on the tenure-track will have up to seven (7) years to earn tenure.

2. A faculty member on the tenure-track is required to be reviewed for tenure no later than the sixth year of his/her tenure-track probationary period, unless a shorter period is stated otherwise in the appointment letter. If rejected for tenure at that time, the faculty member shall receive a one-year terminal appointment that will end at the end of the seventh year. A faculty member who is reviewed and rejected for tenure in the sixth (6th) year may choose to be reviewed again in the seventh (7th) year, but will waive the right to appeal a negative decision to the Faculty Senate Personnel Committee, but may appeal on the

grounds that proper procedures had not been followed, or that the non-discrimination provisions of this Agreement had not been followed, through an expedited grievance and arbitration procedure. Subject to the provisions of Section E.2.a below or Article 22, Section G7 and Article 22, Section W3, in no case shall a tenure-track faculty member who has not been granted tenure serve for more than seven (7) years.

3. With due consideration to the academic needs of the department and/or College or School, consideration for tenure shall be based primarily on outstanding performance and continuing promise of outstanding performance as a faculty member. Teaching/instruction and research/scholarship/ creative activity shall be primary in this evaluation. University service, service to the profession/ discipline, and discipline-based community service shall be secondary. The standard of outstanding performance in research/scholarship/creative activity for tenure shall be informed by standards for tenure at other national research universities appropriate to the discipline under consideration. The award of tenure, thus, is a recognition of past performance and an assessment that the faculty member is capable of greater responsibilities and accomplishments throughout the period of his/her service as a member of the University faculty. Personal and professional integrity are assumed. The ultimate goal of all tenured appointments is to build the best possible faculty for the University.

E. Tenure Eligibility

1. All individuals who are appointed to a tenure-track faculty position are eligible to apply for tenure at any time, regardless of rank.

2. Rules Applicable to All Eligible Faculty

a. If an individual has not been formally informed of being considered for tenure during the sixth year, when such consideration is mandatory, it shall be the responsibility of the individual to inform, in writing, and by December 1st of that academic year, the Department Chair, Dean, and Provost or other designated University officer, that such tenure consideration is necessary. If both the University and the individual miscount the individual's mandatory (sixth) year of eligibility for tenure consideration as set forth above, then the individual shall be considered for tenure as soon as possible following the discovery of such circumstance; and in the event of a negative

decision, the individual shall be given a one year terminal contract. The faculty member shall not be eligible to apply for tenure during the period of the one-year terminal contract.

b. Only individuals with probationary tenure-track appointments made by the President are eligible to be considered for tenure. Excluded, in addition to part-time personnel, are all individuals on an agreed-upon limited period of service, such as Visiting Faculty, Instructors, Clinical Faculty, Research Faculty, Practice Faculty, and Teaching/Instruction Faculty.

c. At the time of the 2004 - 2008 agreement (March 4, 2005), untenured faculty on the tenure-track who have completed any part of their probationary period may elect to extend the probationary period for up to two additional years. This election shall be made no later than July 1, 2005.

d. The only full-time faculty ranks eligible for tenure consideration shall be: Professors, Associate Professors, and Assistant Professors.

F. Review of Progress toward Tenure

1. In addition to any evaluation that may occur when appointments are renewed, faculty on the tenure-track shall be evaluated during their third probationary year with respect to their progress towards tenure. The evaluations shall be provided in writing to the tenure-track faculty member by the Dean of the School/College after consultation with the appropriate faculty committee(s) in the department and/or school/college. When improvement in performance is necessary the written evaluation should identify those specific areas that need to be remediated. The President will consider this evaluation when determining the term of subsequent appointments during the probationary period.

G. Tenure Procedures

1. Levels of review for tenure shall include in consecutive order: a departmental committee; the Department Chair; a College or School committee; the Dean; the Council of Deans and/or the University Tenure and Promotion Advisory Committee; the Provost; and the

President. Recommendations for tenure are made by the President to the Board of Trustees, which has sole authority to grant tenure.

2. Eligibility to Serve on Tenure Committees

a. Only individuals holding tenure at Temple are eligible to serve on tenure committees. Only individuals holding the rank of Professor at Temple may serve as Faculty Senate representatives on the University Tenure and Promotion Advisory Committee or participate in committee deliberations regarding the tenure of a faculty member at the rank of Professor. Faculty members are only eligible to be present, participate in deliberations or vote at one of the following levels of the tenure process: as a member of the departmental committee; as a Department Chair; as a member of the College or School committee; or, as a member of the University Tenure and Promotion Advisory Committee.

b. At the departmental committee level, in addition to student feedback forms, each department will solicit student input in tenure and promotion decisions.

3. Selection of Departmental and College or School Tenure Committees

a. All departmental and College or School tenure committees must be comprised of at least three (3) members. If a department or College or School has fewer than three (3) individuals eligible to serve on the departmental or College or School committee, the Dean may appoint additional persons to serve following consultation with the executive committee, dean's advisory committee or equivalent body in the College or School. Administrators are not eligible to serve on these committees. Should the Dean appoint additional persons from outside the Department or School or College, he/she shall notify the candidates and the school or college committee in writing as to who has been appointed. Such notice shall take place prior to any review, deliberation or action by the promotion committee with respect to that individual or individuals.

b. Only faculty who hold tenure-track appointments or who are tenured may participate in the selection of members of

departmental and College or School tenure committees or nominees for the University Tenure and Promotion Advisory Committee.

c. A department or College or School shall not be precluded from providing in its bylaws that the same committee shall serve as the promotion committee and the tenure committee.

4. Independent External Evaluators of Candidates for Tenure

a. Assessment of the credentials of the candidate shall include written letters of evaluation from individuals from outside the University who are qualified to assess the credentials of the candidate for tenure. A preponderance of these letters shall be obtained from persons who have not worked or collaborated with the candidate. A candidate for tenure and the departmental tenure committee shall each separately submit lists to the Dean that contain the names and professional affiliations of persons whom they recommend to be external evaluators. After review of these recommendations, the Dean may, in his/her discretion, add additional evaluators to the lists. All external evaluation letters received shall be part of the individual's dossier.

5. Documentation of Recommendations Related to Tenure

a. At each level of review, recommendations for promotion and tenure are to be made separately. Each recommendation shall provide an evaluation for teaching/instruction, research/scholarship/creative activity and for service. These ratings, along with the votes and reports of the department, College or School, the Council of Deans and/or University Promotion and Tenure Advisory committees, and the recommendations of the Department Chair, the Dean and the Provost or other designated University officer, shall be recorded on a memorandum of transmittal. At each step during consideration for tenure, candidates shall receive copies of the memoranda of transmittal when they are forwarded by the Department Committee, Chair, College or School Committee, Dean, the Council of Deans and/or the University Tenure and Promotion Advisory Committee and the Provost or other designated University officer.

6. Sequence for Tenure Evaluation Process

a. At each level of review, the candidate shall have the opportunity to communicate in writing to the individual or committee receiving the letter of transmittal from the previous level, to provide his/her perspective on the previous level's review and recommendation. Except in cases in which good cause is shown, the candidate must provide any such communication to the individual or committee within ten (10) days of the date of the relevant transmittal.

b. Initial consideration of tenure cases shall be at the departmental level through a departmental committee. The departmental committee shall report its recommendations to the Department Chair.

c. Following action by the departmental committee, the Department Chair shall:

i. Make an independent recommendation on each tenure case and communicate this recommendation to the departmental committee;

ii. Inform the individual faculty member of the departmental and Chair's recommendations;

iii. Transmit all recommendations of the departmental committee and the Department Chair to the College or School level for consideration.

d. Tenure decisions are next considered by an appropriate College or School committee having responsibility for tenure matters and by the Dean.

e. Following consideration at the College or School level, the Dean has these responsibilities:

i. To make an independent recommendation on each tenure case and to communicate this recommendation to the appropriate committee of the College or School;

ii. To inform the individual faculty member of the college and the Dean's recommendations;

iii. To transmit all recommendations to the Provost or other designated University officer.

f. On receipt of the recommendations on tenure from the Deans, the Office of the Provost shall submit all materials relating to tenure in which all recommending agencies and individuals at prior levels have made a positive recommendation to the Council of Deans for review and recommendation. In its discretion, the Council of Deans may refer any such cases to the University Tenure and Promotion Advisory Committee for its review and recommendation. In cases in which any of the committees or individuals below have not made a positive recommendation, the Provost will refer the case directly to the University Tenure and Promotion Advisory Committee for review and recommendation. Following recommendations by the University Tenure and Promotion Advisory Committee or the Council of Deans in cases which are not referred to the University Tenure and Promotion Advisory Committee, the Provost or other designated University officer shall separately make a recommendation.

g. All such recommendations on tenure shall be forwarded by the Provost to the President for his/her review and recommendation to the Board of Trustees for their review and action.

h. All those who have been formally considered shall be informed by the President whether they have been granted tenure.

i. Where all committees and administrators who have considered a tenure application, as provided above, have recommended the award of tenure to a member of the faculty, and the President and/or the Board of Trustees shall reject such recommendations, they should do so only for compelling reasons, stated in detail to those committees and administrators who made the recommendations.

j. If recommendation for tenure is denied, an appeal on either substantive or procedural grounds may be presented by the faculty member to the Faculty Senate Personnel Committee. The Faculty Senate Personnel Committee shall forward its recommendations to the candidate and to the President or his/her designee within 120 days.

k. Should the Faculty Senate Personnel Committee fail to act within 120 days, the President may, at his/her discretion, appoint a

fact-finder who shall, within forty-five (45) days, forward his/her recommendations to the candidate and the President or his/her designee.

l. The President shall reconsider the decision in light of the report of the Personnel Committee or the fact-finder. If the President then concludes to recommend tenure, he/she shall submit his/her recommendation for tenure to the Board of Trustees.

m. After a decision rejecting an application for tenure has been made, a candidate may utilize the grievance and arbitration provisions of this Agreement only on the grounds that proper procedures had not been followed or that the nondiscrimination provisions of this Agreement had been violated. If the arbitrator finds such violations, the matter will be referred back to the University Tenure and Promotion Advisory Committee, which will review the entire record in the case and make a recommendation to the President. If the President rejects the application for tenure, his/her decision is final and he/she shall give a statement of reasons for the decision. If the President concludes to recommend tenure, the President shall submit his/her recommendation to the Board of Trustees for its consideration. If the Board of Trustees rejects an application for tenure that has been recommended by the University Tenure and Promotion Advisory Committee on appeal, the Board's decision is final and it shall give a statement of reasons for the decision.

H. Expedited Procedure for Tenure on Hire

1. With the approval of the Provost, individual cases of tenure on hire may be handled by an expedited procedure while still adhering to the same standards required for tenure. The expedited procedure shall be used only when it is logistically necessary.

2. In expedited cases, the hiring packet may be used for tenure consideration as well as hiring.

3. The requisite departmental and collegial review committees and individuals may operate out of the normal sequences, but shall make recommendations prior to the Deans, Provost and President. If there are not positive recommendations at each of the four levels, the expedited process will not be used.

4. All expedited tenure on hire cases will proceed sequentially thereafter to the Council of Deans, the Provost, and the President for their review and recommendations.

ARTICLE 12 TERMINATION OF SERVICE OF FACULTY AND DISCIPLINE OF FACULTY FOR JUST CAUSE

A. Termination of service of a tenured faculty member or of an appointment of a tenure-track faculty member before the end of its specified term may be made only for retirement, just cause, or retrenchment.

B. Discipline/Dismissal of Tenured and Tenure-Track Faculty for Just Cause

1. As used in this Agreement, "dismissal" shall refer to the discharge of a tenured or tenure-track faculty member due to the faculty member's dereliction of duties, professional incompetence, grave misconduct or academic dishonesty. Dismissals of tenured or tenure-track faculty for financial, programmatic or other administrative considerations are covered by Article 13 and are not covered by the following "Just Cause" provisions of this Agreement.

2. As used in this Agreement, "discipline" shall include, but is not limited to: written letter of reprimand; ineligibility for study leaves and professional development funds; and, suspensions without pay of varying lengths. Discipline shall not include oral reprimands or oral counseling, so long as no written record is kept in the faculty member's official personnel file, nor shall it include performance evaluations; such matters are not grievable under this Agreement. When appropriate and justified, Temple may also require, as part of a disciplinary action, restitution, appropriate training or counseling, adjustment in assignments and responsibilities, or other remedial action.

3. As used in this Agreement, "just cause" means dereliction of duties, professional incompetence, grave misconduct or academic dishonesty in cases of dismissal. For imposition of discipline other than dismissal, "just cause" may also include, but is not limited to, willful, repeated or serious violations of University policies, insubordination, or other serious breaches of professional conduct, regardless of whether

such conduct amounts to dereliction of duties, professional incompetence, grave misconduct or academic dishonesty.

4. It is understood that in any case involving discipline or dismissal under this Article, Temple bears the burden of proving just cause for such action.

5. A faculty member may ask for, and shall have the right to have, a TAUP representative present whenever the faculty member is asked to participate in an investigatory interview which he or she reasonably believes may result in disciplinary action or dismissal.

6. Pending resolution of the procedures for discipline/dismissal of tenured faculty, a faculty member may be suspended with pay by the Provost in cases where the continued active employment poses an unreasonable risk of harm to the safety of the faculty member or others or disruption of university programs and/or operations.

7. All references to "days" in this Article shall mean "working days."

8. The following procedures, which may be initiated by faculty, Department Chairpersons, Deans, the Provost or other designated University officer, or the President, shall govern cases seeking dismissal or a suspension without pay of a tenured faculty member for more than forty-five (45) days for just cause:

a. An attempt shall be made to resolve the matter informally through one or more personal conferences between the faculty member and appropriate administrative officers;

b. If no resolution is reached informally as described in (a) above, an attempt shall be made to resolve the matter through mediation.

i. An internal, neutral mediator shall be selected by the University.

ii. In no case shall the combined processes in steps (a) and (b) above exceed 30 days.

c. If the matter is not resolved within thirty (30) days, the Dean, in his/her discretion may refer the matter to a Faculty Responsibility Committee (FRC) for a brief investigation regarding the allegations. The FRC shall be constituted and function in accordance with the College's By-Laws, and shall conclude its work within forty-five (45) days of its creation. If an FRC is constituted, the faculty member shall be notified of this fact and the nature of the allegations being investigated. If the Dean does not refer the matter to the FRC, the Dean shall provide to the Faculty Senate Personnel Committee a written statement of the nature of the allegations brought against the faculty member. A copy of the Dean's written statement shall be provided to the faculty member at the time it is forwarded to the Faculty Senate Personnel Committee.

d. If an FRC is not utilized, or if an FRC is utilized and the matter remains unresolved, within forty-five (45) days, the matter shall be referred to the Faculty Senate Personnel Committee for an informal inquiry to verify that the charges are reasonably supported. The Faculty Senate Personnel Committee shall within forty-five (45) days issue a report to the President stating whether the charges are reasonably supported. A copy of the Faculty Senate Personnel Committee report shall be delivered to the faculty member.

e. Should the Faculty Senate Personnel Committee fail to issue a report within forty-five (45) days, the President may, at his/her discretion, either directly proceed with the initiation of formal disciplinary/dismissal proceedings enumerated in step "f" below or appoint an independent investigating officer who is not currently an employee of the University to conduct a preliminary hearing and issue a report stating whether the charges against the faculty member are reasonably supported.

f. When the Faculty Senate Personnel Committee or investigating officer issues a report pursuant to steps "d" or "e" above, the President shall review the report and recommendation and supporting evidence, and initiate any such additional investigation as he/she deems appropriate. If the President determines that the preliminary evidence reasonably supports the charges of "just cause," the President may initiate formal disciplinary/dismissal proceedings by formulation of a written statement of the charges and supporting evidence, even if the recommendation of the Faculty Senate Personnel Committee or

investigating officer is favorable to the faculty member. In the absence of extenuating circumstances, the President should complete his/her review and investigation, if any, and formulate his/her written statement within forty-five (45) days of receipt of the report of the Faculty Senate Personnel Committee or investigating officer.

g. If the President initiates formal disciplinary/dismissal proceedings, he/she shall provide the faculty member and the Faculty Senate Personnel Committee with a copy of his/her written statement and also inform the faculty member that, if the faculty member requests, he/she shall be entitled to a hearing as set forth in sections "h" and "i" below. The President shall also advise the faculty member that failure to dispute the charges in accordance with Section 8.h.i. below shall indicate acceptance of dismissal/discipline in the President's discretion.

h. Pre-hearing procedures shall be as follows:

i. Within fifteen (15) days of receipt of the President's written statement of charges, the faculty member shall provide a written response to the President as to whether he/she disputes the charges and requests a hearing. If a hearing is requested, the Faculty Senate Personnel Committee shall select a hearing committee composed of five (5) persons. The hearing committee shall select its own chairperson.

ii. The hearing committee chairperson shall notify the faculty member in writing of the date, time, place and procedure for the hearing, and a list of proposed committee members and shall provide the faculty member with reasonable time, but in no event more than sixty (60) days, to prepare his/her defense. The faculty member shall have ten (10) days to challenge any proposed member for cause, which means actual or reasonable perceived bias or conflict of interest with respect to the faculty member or the matters at issue. The President or other designated University officer shall rule on any such challenges, and his/her decision shall be final. If the President or other designated University officer sustains any challenges, the Faculty Senate Personnel Committee shall name substitute committee members, and the same challenge process shall be followed until five committee members are selected.

iii. The faculty member may be represented by legal counsel of his/her own choosing at his/her own expense, or by

another faculty member, in connection with the hearing. The faculty member shall also be entitled to have a TAUP representative present at the hearing.

iv. No fewer than fifteen (15) days before the date set for the hearing, the faculty member shall respond in writing to the charges in the President's written statement, and the faculty member and the University shall provide to each other through the committee chairperson a list of witnesses and documents they propose to introduce at the hearing, and a succinct summary of any testimony expected to be offered by such witnesses. The lists may be supplemented thereafter as necessary or desirable in the exercise of due diligence, provided that reasonable opportunity is given to the opposing party to respond, as determined by the committee chairperson.

i. Hearing procedures shall be as follows:

i. Consideration of the written charges and the faculty member's response.

ii. Testimony of witnesses, if appropriate, and examination of documents and other pertinent evidence.

iii. Each party, or the legal counsel or other representative of each party, shall be permitted to participate actively in the hearing proceedings, including a reasonable opportunity to confront and cross-examine witnesses.

iv. The faculty member is permitted, but not required, to testify at the hearing. If the faculty member declines to testify or otherwise participate in the hearing, the committee should proceed on the basis of obtainable evidence.

v. The hearing committee may, at its discretion, establish other rules or procedures for the conduct of the hearing consistent with paragraphs (i) through (iv) above.

vi. Except in extenuating circumstances, the hearing should commence no more than seventy-five (75) days after the President provides the faculty member with a written statement of the charges.

vii. Except in extenuating circumstances, the hearing should be concluded within thirty (30) days after its commencement.

j. Following the hearing and its own deliberations, the hearing committee shall, within forty-five (45) days, submit its written recommendation and reasons therefore to the President and the faculty member. If the hearing committee recommends against discipline/dismissal, the President may (within thirty (30) days, except in extenuating circumstances) still discipline/dismiss the faculty member, but the faculty member may then utilize the grievance (2nd step) and arbitration provisions of this Agreement. If the President imposes discipline more severe than that recommended by the hearing committee, the faculty member may then utilize the grievance (2nd step) and arbitration provisions of this Agreement. If the President accepts and imposes the discipline/dismissal recommended by the hearing committee, the President's decision is final and the faculty member may not utilize the grievance (2nd step) and arbitration provisions of this Agreement, except to challenge the procedural regularity of the hearing.

9. In any case in which the University is seeking to impose as discipline anything other than dismissal, demotion in rank, or suspension without pay for greater than forty-five (45) days, the following procedures shall be used:

a. An attempt shall be made to resolve the matter informally through one or more personal conferences between the faculty member and appropriate administrative officers;

b. If no resolution is reached informally as described in (a) above, an attempt shall be made to resolve the matter through mediation.

i. An internal, neutral mediator shall be selected by the University.

ii. In no case shall the combined processes in steps (a) and (b) above exceed 30 days.

iii. The faculty member may be represented by legal counsel of his/her own choosing at his/her own expense, or

10. The Dean or designated University officer shall provide written notification to the faculty member that disciplinary action other than dismissal, demotion in rank or a suspension without pay for more than forty-five (45) days is being contemplated. Such statement shall include a summary of the basis for the contemplated action, and, when such basis includes allegations of violations of Temple policy or procedure, a reference to any such policy or procedure.

11. The faculty member shall be provided with an opportunity to formally respond to the allegations made by the Dean or designated University officer. Except in extenuating circumstances, such a response must be made within ten (10) days of receipt of the notification.

12. The faculty member shall be provided with an opportunity to meet with the Dean or designated University officer. The faculty member may be represented by legal counsel of his/her own choosing at his/her own expense, or by another faculty member. The faculty member shall also be entitled to have a TAUP representative present. The Dean or designated University officer may have an attorney present if they so desire. Except in extenuating circumstances, such a meeting shall be held within twenty (20) days of the notification.

13. Within seven (7) days following the meeting, the Dean or designated University officer shall notify the faculty member by letter of the final action taken, with a copy to the TAUP representative and/or attorney, if any, who accompanied the faculty member to the meeting.

14. Upon receipt of the letter indicating the University's final decision, the faculty member may exercise his/her rights under the grievance (2nd step) and arbitration provisions of this Agreement.

C. Dismissal/Discipline of Nontenure-Track Faculty for Just Cause

1. Just cause is defined in section B.3 above.

2. An attempt shall first be made to resolve the matter informally through personal conferences between the faculty member and appropriate administrative officers.

a. If no resolution is reached as described in (2) above, an attempt shall be made to resolve the matter through mediation.

3. Assignment in the University Libraries.

i. An internal, neutral mediator shall be selected by the University.

ii. In no case shall the combined processes in steps in (2) and (2a) above exceed thirty (30) days.

3. If this fails to resolve the matter, the faculty member may be dismissed/disciplined by Temple, after consultation with the Department Chairperson.

4. A faculty member so dismissed/disciplined may utilize the grievance and arbitration provisions of this Agreement.

ARTICLE 13 RETRENCHMENT

A. Temple shall have the right, upon such notice as indicated in Section E below, to dismiss faculty members under the two following circumstances:

1. A demonstrably *bona-fide* financial exigency, or

2. As a result of *bona-fide* formal discontinuance of a program or department of instruction.

B. For purposes of this Agreement a dismissal for either of these circumstances shall be referred to as "Retrenchment." Before sending notices of termination because of retrenchment, consultation on the proposed retrenchment shall take place with the Chairperson of any department or program affected and the Dean and College or School curriculum committee of any College or School affected. Also, the Educational Program and Policies Committee of the Faculty Senate shall be advised of the proposed retrenchments. Following the completion of the consultation process, there shall be a meeting with TAUP upon reasonable notice, not to exceed two (2) weeks, to discuss the rationale for and implementation of such retrenchment. At this meeting, Temple shall provide TAUP with: a list of bargaining unit members designated for possible retrenchment along with their date of hire, department, date of tenure and rank; a list of sections being taught by nontenure-track faculty and part-time/adjunct faculty; a list of tenure-track searches

where authorizations to hire exist; and a list of suitable open positions in accordance with Section C below.

C. If and when retrenchment notices are sent, concurrent copies of such notices shall be furnished to TAUP. The notification date of a retrenchment notice shall be the recorded date of the certified mailing by Temple.

D. Retrenchment is one of the most serious steps an institution of higher learning takes. Attempts will continue to be made to increase revenue by all feasible means. Before terminating faculty members because of retrenchment, Temple will first utilize possible temporary alternative assignments and then make reasonable efforts to place the affected faculty members in other suitable positions. (Before sending a notice of retrenchment to a tenured faculty member, Temple shall offer such tenured faculty member a temporary alternative assignment, in accordance with Article 19, to teach a full workload, provided that (1) there is a full work load available which would otherwise be taught by full-time nontenured faculty members or part-time/adjunct faculty members, and (2) the tenured faculty member has the requisite skills and abilities after orientation, if appropriate, to teach such courses. In the event that more than one tenured faculty member is affected and there is not a sufficient work load for each, Temple shall follow the order of priorities set forth in this Article. Such faculty members shall have two (2) weeks from date of notification to inform Temple of their willingness to accept such assignment.) The released tenured faculty member's position will not be filled with a replacement within a period of three years unless the released faculty member has been offered, by order of seniority, re-employment in a tenured position (with at least his/her previous rank and salary) and at least one month within which to accept or decline. An untenured, tenure-track faculty member's position will not be filled for a period of two years without prior notification to the released faculty member that candidates for the position are being sought.

E. Suitable positions for reassignment of tenured faculty within Temple are:

1. Other teaching positions;
2. Academic Professional positions;
3. Assignment in the University Libraries.

F. The bargaining unit status of the new positions will be determined by the duties associated with that position and the past decisions of the Pennsylvania Labor Relations Board.

G. For positions outside the TAUP Bargaining Unit, the faculty member's tenure status and salary may be changed at the end of the 12-month period. At the time the position is offered to the faculty member, Temple will inform the faculty member of the tenure status and pay rate which the position will have at the end of the 12-month notice period.

1. The salary and seniority of a faculty member moving to a new assignment within the TAUP Bargaining Unit shall not be reduced by that move.

2. If a retrenched tenured faculty member applies for and is accepted for an authorized academic professional position, the faculty member shall have regular appointment in that new position effective upon the first day of appointment in that position.

3. If a retrenched tenured faculty member applies for and is accepted for a tenure-track position in another department, the faculty member's seniority and tenure shall be carried to the new department.

4. In filling vacancies within the TAUP Bargaining Unit, Temple shall give first consideration to a retrenched tenured faculty member in considering the qualifications of applicants for the position. Qualifications shall include appropriate academic credentials, present ability to perform the work required, quality of prior job performance, and potential for growth and achievement in the new job.

5. Reasonable efforts shall be defined as Temple's obligation to bring position vacancies to the attention of retrenched tenured faculty, and resumes of retrenched faculty shall be made available to those responsible for filling such vacant positions. Copies of such position vacancies shall be forwarded to TAUP.

H. Written notice that employment is to be terminated because of retrenchment shall be given as follows:

1. For a faculty member holding a first one-year contract, at least three months;
2. For a faculty member holding a second one-year contract or a third one-year contract, at least six months;
3. For an untenured faculty member who has either:
 - a. Completed three or more years of service at Temple, or
 - b. Been issued a three-year contract at the time of first appointment to Temple, at least 12 months.
4. For tenured faculty, at least 12 months.
5. In each case, equivalent severance salary may be substituted providing it is mutually agreeable to Temple and the affected faculty member.
6. During the twelve (12) month notice period, a faculty member who has indicated a willingness to accept an alternative assignment as per Article 13, Section C, shall continue to be entitled to an alternative assignment if a workload becomes available during the twelve-month notice period. If a workload becomes available and is accepted, the letter of retrenchment shall be rescinded.

I. The order of retrenchment for faculty within a department or program of instruction shall be:

1. Part-Time Faculty;
2. Nontenured faculty, with individual decisions based upon such important factors as affirmative action goals, academic excellence and years of service.
3. Tenured faculty, provided that the faculty member with the least number of years of service to Temple University shall be released first.

a. In the event of identical number of years, the faculty member with the fewest number of years since achieving tenure shall be released first.

b. In the event of identical number of years since achieving tenure, the faculty member of lowest rank shall be released first.

c. A tenured faculty member can be retrenched in an order other than by seniority only if Temple justifies (in writing) that he/she cannot perform work which is essential to the continuation of his/her department or program, while another tenured faculty member of lesser seniority (who would continue to be employed instead of the faculty member of greater seniority) can do this essential work.

d. Time spent on unpaid leave, prior to July 1, 1983 not connected with the receipt of an educational or research/creative award, shall not accrue as years of service under Section F.3(a), (b) and (c) above.

e. Time spent by tenured faculty on unpaid leave which commenced on or after July 1, 1983, and as approved by Temple on an annual basis, shall accrue as years of service under Article 13, Section F.3(a), (b) and (c).

4. Any faculty member retrenched may utilize the grievance and arbitration provisions of this Agreement.

ARTICLE 14 RENEWAL OR NONRENEWAL OF TENURE-TRACK AND NONTENURE-TRACK FACULTY APPOINTMENTS

A. For full-time tenure-track faculty who do not have tenure, written notice that employment is to be terminated shall be given as follows:

1. For a faculty member holding a first one-year contract expiring at the end of the Spring academic period, not later than March 15; or if the one-year appointment terminates at another time, at least three (3) months in advance of its termination.

2. For a faculty member holding a second or third one-year contract expiring at the end of the Spring academic period, not later than December 15; or if the second or third one-year appointment terminates at another time, at least six (6) months in advance of its termination.

3. For a faculty member who either has completed three or more years of service at Temple or has been issued a three-year contract at the time of first appointment at Temple, at least twelve (12) months in advance of the expiration of the appointment.

B. For full-time nontenure-track faculty employed for three (3) consecutive years or less in one of the classifications described in Article 15 of this Agreement, whose letters of appointment include a termination date, the appointment shall end at the termination date without further notice. Full-time nontenure-track faculty employed for more than three (3) consecutive years shall be given written notice of renewal at least two (2) months prior to the expiration of his/her contract.

C. Temple shall have the option of substituting equivalent severance salary for the period of advance notice. In making this determination, Temple will take into consideration the faculty member's expressed preference.

ARTICLE 15 NONTENURE-TRACK FACULTY CLASSIFICATIONS

A. The University may create classifications of faculty who are not on the tenure-track. At the discretion of the University, these faculty members will be eligible for single- year or multiple- year appointments

without limit. These nontenure-track classifications are limited to appointment of persons who are not charged with the tripartite mission of teaching, research and service, but who specialize in one of the three missions and whose assignment is wholly or predominantly in one of the three missions.

1. Such classifications may include, but are not limited, to those listed in the Provost's guidelines issued June 12, 2008. Any classifications and ranks may be added or eliminated in the sole discretion of the University. If the University adds or eliminates classifications or ranks, it shall notify TAUP before implementation.

2. In cases in which a faculty member has received a series of nontenure-track appointments amounting to 5 consecutive years or more and is being reappointed to a single-year appointment, the Dean will provide a written explanation to the Office of the Provost and faculty member. If a faculty member has been on the nontenure-track for five (5) consecutive years or more and is not being renewed, he/she shall receive a separate termination notice at least four (4) months prior to the termination date in his/her letter of appointment.

3. Nontenure-track faculty members shall be free to apply for open tenure-track positions. Similarly, individuals on the tenure-track shall be free to apply for available positions as nontenure-track faculty.

B. Appointment and Reappointment Procedure

1. Searches to fill nontenure-track positions may be conducted at the local, regional or national level. Searches shall not be required when reappointing a nontenure-track faculty member whose initial appointment was the result of an appropriate search or whose appointment has already been renewed as of the execution date of this agreement. For cases in which inadequate time exists to conduct a search, individuals may be hired and will, in most cases, be given a maximum appointment of one year. Affirmative action procedures as defined by the University shall be followed in accordance with University policy.

2. The processes for appointment and reappointment shall be discipline specific and shall be determined by the Dean in consultation with Department Chairs, department committees and other appropriate collegial bodies. These processes shall include consultation with

appropriate departmental committees and/or faculty within the department, except in urgent situations, such as when faculty are unavailable for consultation and a rapid decision is necessary. The faculty in the relevant departments and colleges shall be provided a copy of the procedures once they have been approved by the Dean. Faculty shall be notified of any changes in the procedures.

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. If the responsibilities of a nontenure-track faculty member were changed during the previous year, it will 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 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 15. Evaluations shall be based on multiple measures of performance and accomplishment in relation to the type of 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.

C. Promotion Standards and Procedures

1. The University will maintain uniform guidelines on procedures for schools and colleges to follow for promotion of nontenure-track faculty. Such guidelines shall provide for timely notification of the individual as his/her application for promotion proceeds through the levels of review. Applications for promotion in

rank shall be considered in any year, whether the individual is currently under a single year or multi-year appointment.

2. The processes for promotion shall be discipline specific and shall be determined by the Dean in consultation with Department Chairs, department committees and other appropriate collegial bodies. These processes will be consistent with University established guidelines. The faculty in the relevant departments and Colleges shall be provided a copy of the procedures once they have been approved by the Dean. Faculty shall be notified of any changes in the procedures.

ARTICLE 16 DEPARTMENT CHAIRS

A. TAUP and Temple recognize that the role of the Chair differs among academic units across the University and, in some cases, among departments within the same collegial unit.

B. The Dean may appoint Department Chairs after consultation with the tenured and tenure-track faculty. Department Chairs serve for initial terms of up to five (5) years and an additional term of up to five (5) years but at all times Department Chairs serve at the pleasure of the Dean. Except in unusual circumstances, Department Chairs may not serve for more than ten consecutive years.

C. An acting chair may be appointed while internal or external searches are taking place and/or at the end of such searches if no appointment is made. The Dean may appoint acting Department Chairs after consultation with the Departmental faculty for terms of up to two (2) years.

D. Searches for and Appointment of Department Chairs

1. When the Dean initiates the search for a department chair, an advisory committee shall be constituted with at least a majority being members of the departmental faculty. The department members shall be elected by the full-time faculty of the department.

2. The Dean may specify whether the search is limited to internal or external candidates or if both internal and external candidates

are to be considered. If internal candidates are to be considered, all members of the department are eligible to apply.

3. The advisory committee shall review the credentials of all candidates and shall interview a reasonable number of candidates that the committee and the dean agree should be interviewed.

4. After interviewing the candidates, the committee shall give the dean a list of preferred candidates consisting of not fewer than two persons and preferably more. Usually the Dean will then meet with the committee to hear the committee's views and to discuss further the preferred list of candidates.

5. The Dean may then appoint a department chair. If the Dean does not intend to appoint one of the committee's preferred candidates, the Dean shall meet with the committee to explain why he/she does not intend to make such an appointment and to hear the views of the committee members about the preferred candidates and any candidate the dean may propose to appoint.

6. During the time when a chair has not been regularly appointed, the Dean may appoint an acting chair.

E. The University may, in its sole discretion, assign management rights and responsibilities to the Department Chairs which may include but are not limited to:

1. Class scheduling and faculty assignment
2. Review of faculty for tenure and promotion
3. Review of faculty for merit pay awards
4. Review of departmental budgets
5. Reporting for the Administration to the faculty and for the faculty to the Administration

F. Department Chairs may be compensated for the extra duties of that office during the Fall and Spring Semesters by a reduction from the base teaching work load.

G. Compensation/Stipends of Department Chairs

1. A faculty member shall receive additional compensation in the form of a stipend for serving as a Chair.
2. Minimum stipends for a Chair during the Fall and Spring semesters shall be 5% of base salary for Chairs and shall be 10% of base salary for Chairs of departments consisting of more than 150 majors and 15 faculty.
3. A Chair shall receive a minimum additional stipend of \$1500 per year if enrollment of a department exceeds 250 majors and a minimum additional stipend of \$1500 per year if there are more than 25 full-time faculty in a department.

H. If a Chair is assigned a full workload over the summer, he/she may receive, at the discretion of the Dean, summer compensation not to exceed 2/9ths of his/her base salary.

ARTICLE 17

**APPOINTMENT, PROMOTION, AND TERMINATION
OF SERVICE OF LIBRARIANS**

A. Terms of Appointment

1. All full time librarians within the bargaining unit shall be appointed for such terms of office as shall be provided in this statement of policy, subject to the provisions contained herein with respect to the termination of their appointments. The terms and conditions of every appointment shall be stated in writing and shall be in the possession of both Temple and the librarian before the appointment becomes effective.

2. Librarians shall be appointed initially for a term to end on June 30th and may be reappointed for up to four (4) additional one (1) year terms followed by a two (2) year term and then by regular appointment.

a. A Committee defined by the Academic Assembly of Librarians will advise the Dean of University Libraries or other person who shall be designated as the chief administrator of the University

Library on decisions to grant or not to grant reappointment during the first four (4) years.

i. Review by a peer committee established by the Academic Assembly of Librarians shall be the first step in considerations for contract renewal, regular appointment and promotion. This peer committee shall submit its recommendations and the reasons therefore, to the Dean of University Libraries and inform the individuals involved.

ii. The Dean of University Libraries shall inform in writing the individuals and the committee of his/her decisions, and the reasons for them within ten days after receiving the recommendations of the committee.

iii. The Dean of University Libraries' decision shall be made at least ninety (90) days prior to the expiration of any contract. The Dean of University Libraries' decision during the first four (4) probationary years is not subject to the grievance or arbitration provisions of this Agreement.

b. The probationary period shall consist of a series of terms amounting to six (6) full years, except in the case of Librarians appointed during the year in which case it shall be a series of terms not exceeding six and one-half (6½) years. For the purposes of counting years in the probationary period, each full year shall begin on July 1 and terminate on June 30 of the following calendar year.

i. In the event that a librarian will not be granted a regular appointment, a termination of contract notice must be provided in writing at least six (6) months prior to the expiration of his/her sixth full year of service or he/she shall be granted a one (1) year terminal contract for his/her seventh year of service.

ii. A librarian initially hired at the L1 rank must be promoted to the L2 rank prior to the beginning of his/her seventh full year of service or he/she will receive a terminal one-year contract (or a six months' notice of termination).

c. Librarians in service on the effective date of this Agreement may extend their probationary period by two (2) years upon written notice by July 1, 2005.

3. A librarian's base salary is for a work year which includes eight weeks scheduled time off per year. Any librarian who works additional week(s) or day(s) shall receive additional compensation at the rate of 2.4% of the base salary per additional week worked. Time off will be assigned in one block of at least four weeks and the remainder to be taken at the employee's request with approval of the Department Head.

a. On or before May 1 of a given year, the Dean of University Libraries shall inform each librarian of that librarian's four week block of scheduled time off for the following July 1 to June 30 period. Such assignments shall be made after consultation with the librarians as to their time off preferences. No librarian may be required to work for more than 11 months during any July 1 to June 30 time period.

b. Any changes in the assigned periods of work shall be by mutual agreement between the librarian and the Dean of University Libraries, except that in the event of unforeseeable circumstances assignments may be changed by the Dean of University Libraries after consultation with the affected librarians.

B. Standards for Promotion and Completion of the Probationary Period

1. Criteria for promotion and completion of the probationary period shall include:

a. effectiveness of performance as a librarian.

b. 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 university librarianship.

c. effectiveness of service to the library and/or to Temple.

d. More specific criteria for promotion to the various grade levels and for completion of the probationary period and the relative weighing of these criteria shall be recommended by the Academic Assembly of Librarians and concurred with by the Dean of

University Libraries. Promotion to L4 is to be granted on the basis of exceptional achievement in the context of a major university library.

2. Librarians may always be considered for completion of the probationary period after shorter periods of service than those specified above. Under exceptional circumstances, librarians with significant experience in a major university library may be granted a regular appointment upon initial employment.

C. Procedures

1. Consideration for promotion and/or completion of the probationary period may be initiated at the appropriate time by the librarian.

2. All evaluations for reappointment, promotion, and regular appointment shall be through the appropriate Committee of the Academic Assembly and the list of candidates shall be sent to the Dean of University Libraries.

3. The Committee shall submit its recommendations and reasons therefore, to the Dean of University Libraries and inform the individuals involved.

4. The Dean of University Libraries shall inform in writing the individuals and the Committee of his/her recommendations and the reasons for them within ten (10) days after receiving the recommendations of the Committee.

5. The recommendations of the Dean of University Libraries, and all recommendations of the Committee, shall be forwarded immediately to the Provost or other designated University officer for final resolution. The decision of the Provost or the Provost's designee must be given in writing within thirty-five (35) days to the individual, the Dean of University Libraries, and the Committee of the Academic Assembly.

6. Librarians who have completed the probationary period shall maintain this status even if they have a physical or mental disability of up to six months' duration that prevents them from carrying out their responsibilities. With the appropriate medical certification, the librarian may return to his/her University responsibility with the status of having

completed the probationary period. In addition, the librarian shall have recall rights to the same or an equivalent position, if available, for a further period of twelve (12) months.

7. Time spent on official leave from the University and approved by the University will not be included in the calculations of the various time periods stated above unless the librarian requests in writing to the Dean of University Libraries, and the Dean of University Libraries approves, that such leave time be included in the timing of decisions on completion of the probationary period.

D. Librarians Hired for Fixed Periods of Time

1. The Dean of University Libraries, when appropriate, shall be able to hire individuals who are professional librarians to work exclusively on grant and foundation supported projects for fixed periods of time – generally from one to three years, but not to exceed three years. Such librarians shall not perform tasks normally assigned to probationary or permanent librarians.

2. Librarians hired specifically for the grants and foundation supported projects shall receive contracts of employment from Temple in one year appointments which can be extended in one year appointment periods if the grant is extended. The term shall be defined in the offer letter and shall also include a three month probationary period in the first contract year.

3. Librarians hired specifically to work on a grant or foundation supported project shall not be subject to an annual contract renewal or promotion review by a peer committee established by the Academic Assembly of Librarians. They shall, however, have clear goals and objectives stated in their initial appointment letters. The librarians shall meet with the Dean of University Libraries or his/her designee to discuss their responsibilities and performance in meeting their goals and objectives and shall subsequently receive a written annual performance review from the Dean of University Libraries or his/her designee based on those goals and objectives. More frequent performance reviews may occur in the first year of appointment.

E. These librarians shall be represented by TAUP and be covered by the provisions of the collective bargaining agreement for the term of their

employment with the exceptions noted in this article.

1. The employment contract with Temple of these librarians shall end at the end of the grant or foundation supported project. They shall not be covered by the lay-off provisions in Article 17, Section E3 and F of the collective bargaining agreement between TAUP and Temple.

F. Evaluation of Librarians

1. When formal evaluations are made, the evaluating supervisor shall discuss the evaluation with the librarian; it shall be signed by both individuals and placed in the librarian's personnel file. This signing shall not be deemed to constitute approval by the librarian. The librarian is entitled to attach any written comment or refutation the librarian deems appropriate to the evaluations.

G. Termination of Service by Temple

1. Written notice that an appointment is to be terminated because of retrenchment or non-renewal of a term appointment shall be given to a librarian as follows:

- a. Three months for less than two years of service.
- b. Six months after two years of service.
- c. In each case, Temple shall have the option of substituting equivalent severance salary.

2. Termination of service of a librarian who has completed the probationary period or an appointment before the end of its specified term may be made only for retirement, just cause, or retrenchment.

3. Retrenchment of librarians within the Paley budget system or within another budget unit included in the TAUP bargaining unit shall be made according to the following order:

- a. part-time librarians,
- b. librarians on probationary appointment by inverse order of the date of hire within the library,

c. librarians who have completed the probationary period by inverse order of date of hire within the library.

d. In each of the above cases, it is recognized that the librarian possesses special skills, training, or education necessary for the continued operation of library programs and that librarians who have completed the probationary period may not be retrenched until after all part time librarians and librarians on the probationary period are retrenched.

4. Temple shall make reasonable efforts to place retrenched librarians in other positions in the University.

5. Just cause means incompetence, grave misconduct, or neglect of duty.

6. A librarian who has completed the probationary period and who is terminated (except for retirement) or laid off shall be entitled to utilize the grievance and arbitration provisions of this Agreement.

H. Recall

1. Following a lay off due to retrenchment, any librarians laid off due to retrenchment shall be recalled in inverse order of lay off provided the librarians have the present ability to perform the work available. Laid off employees shall have recall rights for a period equal to their length of service but in no event for more than two years.

2. Upon receipt of such an offer in writing, a librarian shall have one month to decide whether to accept the offer.

I. Terminology

1. Throughout this contract, the term Dean of University Libraries shall refer to the administrator who is the designated head of the University Libraries or, if there is no such administrator, to the designated head of the Paley Library with respect to matters involving librarians in that Library and to the Dean of any School or College that shall employ a librarian.

ARTICLE 18 APPOINTMENT, PROMOTION AND TERMINATION OF SERVICE OF ACADEMIC PROFESSIONALS

A. An academic professional is a full-time employee of the University whose work is necessary or adjunct to the teaching of students or to research functions of the University. The work shall:

1. Be predominantly intellectual and varied in character; and
2. Require consistent exercise of discretion and judgment; and
3. Require knowledge of an advanced nature customarily acquired by specialized study in an institution of higher learning or its equivalent; and
4. Be of such character that the output or result accomplished cannot be standardized in relation to a given period of time; or
5. Be original and creative in character in a recognized field of artistic endeavor and the result of which depends primarily on the invention, imagination, or talent of the employee.

B. Academic professionals include those positions in TAUP as of the date of the signing of this Agreement.

C. Terms of Employment

1. Each full-time academic professional and TAUP shall receive, at the time of employment, a letter setting forth a brief general description of the academic professional's duties, salary and any employment conditions particular to the individual academic professional.

2. The probationary period shall be one year.

a. The academic professional or TAUP may, within 30 days after receipt of a new or revised job description or salary, file a grievance if the academic professional or TAUP asserts that:

b. The salary, which shall be communicated not later than 60 days after receipt of the new job description, does not bear a fair relationship to the new duties;

c. That the stated duties do not qualify the individual as an academic professional;

3. Any new or vacated position may be designated as a fiscal year or academic year position.

D. Periodic Evaluation of Academic Professionals

1. When formal evaluations are made, the evaluating supervisor shall discuss the evaluation with the academic professional. The evaluation shall be signed by both individuals and placed in the academic professional's personnel file. This signing shall not be deemed to constitute approval by the academic professional. The academic professional is entitled to attach any written comment or refutation the academic professional deems appropriate to the evaluations.

E. Termination of Service by Temple

1. Any academic professional who is terminated, except for just cause or retirement, shall be entitled to written notice or equivalent salary as follows:

- a. Two weeks if employed less than six months;
- b. Four weeks if employed more than six months but less than one year;
- c. Two months if employed more than one year but less than two years;
- d. Four months if employed more than two years but less than four years;
- e. Six months if employed four years or more.

2. Academic professionals who have completed the probationary period shall be terminated only for retirement, just cause, or retrenchment.

a. Just cause means incompetence, grave misconduct, or neglect of duty.

3. Termination of an academic professional during the probationary period shall not be subject to the grievance and arbitration provisions of this Agreement.

4. An academic professional who has completed the probationary period and who is terminated (except for retirement) or laid off shall be entitled to utilize the grievance and arbitration provisions of this Agreement.

5. Retrenchment of Academic Professionals

a. Retrenchment within a department or program shall be applied in the following order:

i. Part-time employees who are functioning as academic professionals;

ii. Academic professionals in the probationary period;

iii. Academic professionals who have completed the probationary period in reverse order of the date of hire within Temple provided that, in each case, the academic professionals remaining shall have the requisite qualifications or specialties to perform the work required.

b. Temple shall make reasonable efforts to place retrenched academic professionals in other positions in the University.

6. Recall following Retrenchment

a. Following a lay-off due to retrenchment, any academic professional laid off due to retrenchment shall be recalled by the department or program in inverse order of lay-off provided the academic professional has the present ability to perform the work available. Laid-off employees shall have recall rights for a period equal to their length of service but in no event for more than two (2) years. Upon receipt of such an offer in writing, an academic professional shall have one (1) month to decide whether to accept the offer.

b. The seniority and accumulated sick leave shall not be reduced for any academic professional who is recalled and takes another position within the bargaining unit.

F. Discipline

1. Discipline of an Academic Professional shall be for just cause. Just cause means incompetence, grave misconduct, or neglect of duty.

2. When a question of disciplining an Academic Professional arises, the following steps shall be followed:

a. An Academic Professional may be suspended immediately under extreme circumstances if there is a threat of immediate harm to himself/herself or others.

b. The Academic Professional shall be informed of the nature of the problem by the Dean or other administrator.

c. An attempt shall be made to resolve the issue through informal meetings with the supervisor or other pertinent university administrative personnel.

3. If the above procedure fails to resolve the problem satisfactorily, the Dean or other administrator shall form an ad hoc committee of at least two Academic Professionals and at least two bargaining unit members familiar with the area of expertise of the Academic Professional being considered for discipline.

4. The Dean shall charge the committee to investigate the allegations against the Academic Professional.

5. The ad hoc committee shall provide the Academic Professional reasonable time to respond to the allegations.

6. The ad hoc committee shall provide a report of its findings to the Dean within 45 days of receiving its charge with a copy to the Academic Professional.

7. The Academic Professional shall be allowed to provide a written rebuttal to the Dean.

8. The Dean shall have 30 days to render a decision concerning the imposition of discipline in the case.

9. The Academic Professional shall have the right to take the matter to grievance and arbitration.

G. Discipline of an academic professional during the probationary period shall not be subject to the grievance and arbitration provisions of this Agreement.

ARTICLE 19 WORKLOAD

A. Faculty

1. The assigned workload for full time faculty shall be reasonable and fair and shall usually consist of a combination of teaching, research and creative activities, and service to Temple University. The assigned workload of a faculty member engaged only in teaching and minimal service to Temple is 12 semester credit hours per semester.

2. The teaching workload shall be appropriately reduced by the Dean for the following efforts: active involvement in research and/or publication or equivalent creative activity; advising of graduate theses or dissertations and/or independent study; combinations of 4 and 3 credit-hour courses or unusual contact-credit hour burdens; service to Temple

University; unusually demanding courses; and the performance of administrative duties.

3. Temple may substitute the teaching of non-credit courses or workshops and participation in externally funded Temple projects for an equivalent of credit courses taught by the faculty member.

4. Temple may give a full-time faculty member a temporary alternative assignment, i.e., a teaching assignment for other than his/her home department, or an administrative or advising assignment. A temporary alternative assignment shall not affect the faculty member's membership, seniority, and tenure in his/her home, merged, reorganized or successor department.

a. In making temporary alternative assignments, the following principles shall be applied:

i. The proposed assignment shall be discussed by the Dean with the faculty member a reasonable time in advance of beginning the assignment.

ii. Every effort shall be made to maintain some portion of a faculty member's total workload in his/her home department.

iii. Before new faculty are appointed in a department, faculty members of that department on temporary alternative assignment elsewhere shall first be offered the opportunity to reassume teaching assignments within the department.

iv. In cases of disputes over temporary alternative assignments, the final decision with a college or school shall be made by the Dean and for inter-college/school disputes, the final decision shall be made by the Provost or other designated University officer, subject in each case to the terms and conditions of this agreement.

5. If Temple wishes to require faculty in a department to accept any two (2) of three (3) semesters as the basic academic year, the Dean of the College or School may initiate such a plan in that Department provided that:

a. There is appropriate consultation between the Dean, the Department, and individual faculty members, and

b. Notice of semesters in a given year assigned to a given faculty member shall be given to the faculty member not later than the preceding May 15.

c. Insofar as some courses are taught for extra compensation, consideration shall be given to the equitable distribution of such teaching among the faculty members of the Department, and, where appropriate, within the college or school.

d. A faculty member may not be required to teach, without additional compensation, over the fall, spring, and summer semesters except as in A.6 below.

6. With the approval of Temple, an individual faculty member may substitute the summer semester for either a fall semester or a spring semester. With the approval of Temple, an individual faculty member may deploy himself/herself across the three semesters in a manner accepted by him/her without additional compensation.

7. The University Calendar

a. A Year (September 1 - August 31) shall be divided into three (3) academic semesters:

Fall:	September 1 to December 31
Spring:	January 1 to May 31
Summer:	May 1 to August 31

b. The regular University year shall be nine (9) months in length, including the fall and spring semesters. The fall semester shall begin one (1) week before the beginning of classes for the fall semester, and faculty shall be expected to be available during that week for advising of students, departmental and other meetings and such other duties as may be appropriate to the academic program. Temple shall each year establish the starting date of the fall semester at least one (1) year in advance of that date.

c. Temple may, in its sole discretion, cancel classes at any of its campuses for reasons of weather or other natural or manmade emergency. Temple may, in its sole discretion, add one (1) day to the academic year for each such emergency day and reschedule classes or schedule make up classes to avoid loss of time or other academic activities.

B. Librarians and Academic Professionals

1. The average workweek shall be 35 hours. The workload for librarians and academic professionals shall be fair, reasonable, and consistent with service and professional responsibilities to Temple.

C. Budget Unit Heads shall grant appropriate compensatory time off for hours scheduled and worked beyond the regular workweek. Scheduling of compensatory time off shall not be unreasonably denied.

**ARTICLE 20
SALARIES**

Salary Minima

A. The following annual salary minima shall apply:

1. The following salary minima shall apply to all faculty:

Faculty	Effective July 1, 2010	
Instructor	\$40,000	\$42,500
Assistant Professor	\$42,500	\$44,500
Associate Professor	\$47,500	\$52,000
Professor	\$57,500	\$62,000

2. Effective July 1, 2009, the following salary minima shall apply to all librarians:

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

3. Effective July 1, 2009, the following salary minima shall apply to all academic professionals:

Academic Professionals	
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

4. Temple and TAUP will meet to discuss the transition of the Academic Professional "L" grades to the Temple University "T" grade system.

B. 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 on the July 1 following the promotion determination of eight percent (8%) of the promoted individual's salary as of the preceding June 30.

Instructor	\$1150 credit hour
Assistant Professor	\$1250 credit hour

2. In any year, the amount granted for promotions shall be reduced by the amount of the increase received as of July 1 due to the application of the salary minima.

C. Miscellaneous

1. Minimum Compensation for Summer or Other Third Academic Semester

a. In its discretion, Temple or the Deans of specific schools/colleges may pay any faculty member at a higher rate to secure summer teaching.

b. Effective for the 2009 summer sessions, summer or third academic semester teaching shall be paid at a minimum rate of \$1,800 for each semester hour taught. In its discretion, Temple or the Deans of specific schools/colleges may pay any faculty member at a higher rate to secure summer teaching.

c. Effective for the 2010 summer sessions, summer or third academic semester teaching shall be paid at a minimum rate of \$1,850 for each semester hour taught.

d. Effective for the 2011 summer sessions, summer or third academic semester teaching shall be paid at a minimum rate of \$1,900 for each semester hour taught.

e. When utilizing faculty as summer advisors, Temple shall compensate the faculty member at .55% (fifty-five hundredths of one percent) of the annual salary for each day worked (based on the prior year annual salary as of June 30).

2. Compensation for Overload Teaching

a. Minimum compensation for overload teaching by bargaining unit faculty during the academic year shall be as follows effective as of the 2009-2010 academic year:

Instructor	\$1155/ credit hour
Assistant Professor	\$1225/ credit hour

Associate Professor	\$1300/ credit hour
Professor	\$1375/ credit hour

b. At the discretion of the Dean, a faculty member may be paid additional compensation for overload teaching.

D. Increased compensation

1. 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.

2. There shall be an annual salary adjustment pool of a minimum of \$100,000 per year. Bargaining unit members may make written application to the Dean of their School or College for salary adjustment for any reason at any time. The Dean shall inform the applicant of his/her recommendation in writing within sixty (60) days.

3. If an applicant disagrees with the Dean's recommendation, the applicant may request to review the matter with the Vice Provost for Faculty Development and Faculty Affairs or other designee of the Provost.

4. In the event that a salary increase or award is given, Temple shall inform TAUP in writing within ten (10) days of the decision.

E. Outside Compensation for Non-Temple Work

1. During the academic year or their contract year, faculty members, with the prior approval of the Dean, may take on duties unconnected to their Temple employment for additional compensation provided that:

a. The outside work does not exceed the equivalent of an average of one working day per week exclusive of weekends.

b. The outside work does not interfere with their assigned Temple responsibilities.

c. The extra responsibilities are compatible with the University's conflict of interest policy.

**ARTICLE 21
SALARY INCREASES FOR
FACULTY, LIBRARIANS AND ACADEMIC PROFESSIONALS**

A. For faculty, librarians, and academic professionals, the following salary increases shall apply:

<i>Year Beginning:</i>	<i>Across-the-Board</i>	<i>Merit Pool</i>	<i>Stimulus Bonus Payment</i>
<i>July 1, 2008</i>	<i>0%</i>	<i>1%</i>	
<i>July 1, 2009</i>	<i>2%</i>	<i>1%</i>	<i>.75% (see B below)</i>
<i>July 1, 2010</i>	<i>2%*</i>	<i>1%</i>	<i>.75% (see B below)</i>
<i>July 1, 2011</i>	<i>2%*</i>	<i>1%</i>	<i>.75% (see B below)</i>

*See Section
C5 below

B. Stimulus Bonus Payment

1. If Temple receives federal State Fiscal Stabilization Funds (SFSF) as a public Institution of Higher Education during FY 2009 – 2010 at the level proposed in the Commonwealth's application of May 19, 2009, and a direct Commonwealth appropriation (education and general) for FY 2009 – 2010 of not less than \$164 million, then Temple shall pay on or before July 31, 2010, a three quarters of one percent (.75%) bonus to each member of the TAUP bargaining unit employed for that FY through the spring semester, prorated for any partial year of service.

2. If Temple receives SFSF funds and a direct Commonwealth appropriation (education and general) at the above-stated levels or higher for FY 2010 – 2011, then Temple shall pay on or before July 31, 2011, a three quarters of one percent (.75%) bonus to each member of the TAUP bargaining unit employed for that FY through the spring semester, prorated for any partial year of service.

3. These bonuses do not go into base pay.

4. For FY 2011 – 2012 the "Stimulus Bonus Payment" is contingent upon Temple's receipt of a minimum of \$175 million for its FY 2011 – 2012 direct Commonwealth appropriation (education and general). Temple shall make the payment, subject to the condition, on or before July 31, 2012. It will be paid to each bargaining unit member employed for that fiscal year through the spring semester, prorated for any partial year of service.

5. This bonus payment does not go into base pay.

C. Faculty Merit Awards

1. All faculty members in the bargaining unit shall be eligible for consideration for merit awards. Merit awards shall be given for recognition of exceptional performance of the duties and responsibilities set forth in Article 11 for tenured and tenure-track faculty and Article 15 for nontenure-track faculty of this agreement for promotion to the faculty member's rank. Specifically, merit awards shall be given principally for outstanding performance in teaching/instruction and in research/scholarship/creative activity. Outstanding performance in service to the University, in service to the profession/discipline and in discipline-based community service may also be considered in making merit awards.

2. The merit pool shall be divided into merit units. Each merit unit shall equal \$600. Half units may be awarded after the first unit. Any fraction of a merit unit remaining in the pool shall be rounded up.

3. Nominations for merit awards may be made by faculty members themselves, or colleagues, Chair, Deans, or Temple.

4. Upon ratification, the Provost will develop guidelines regarding the annual reports for faculty within each school/college. Final guidelines will be distributed to all faculty members by May 1, 2010.

5. Effective September 2010 and each year thereafter, each faculty member shall be expected to submit an annual report to his/her Department Chair by September 1 detailing the faculty member's activities and achievements at Temple from the previous year. Each faculty member who submits an annual report using the format as established by the Office of the Provost shall be entitled to receive 0.25%

to base salary taken from the across-the-board increase amount. A faculty member who fails to submit an annual report shall not be eligible for this 0.25% increase. The 0.25% increase shall be paid beginning in the September payroll and be retroactive to July 1.

6. If an individual fails to file an annual report in a timely manner, that .25% shall be transferred to the merit pool. TAUP shall be notified of any such transfers.

7. The commencement of the nominating process will be announced by Temple to all faculty members, Department Chairs, and Deans each year.

8. Uniform written guidelines governing the process of nomination and criteria for recommending faculty for merit awards shall be distributed by Temple to all faculty, Department Chairs, and Deans.

9. Each Dean shall consult with Department Chairpersons about the nomination of persons for merit salary increases.

10. The Department Chair may consult with a departmental merit committee prior to making recommendations to the Dean regarding merit awards.

11. When the Department Chair decides who is being recommended for merit, the chair shall inform those faculty members who have been recommended for merit, the reason for the recommendation and numbers of merit units recommended.

12. The Dean shall also consult with a College- or School-wide merit advisory committee consisting of no more than ten members who shall be selected in equal numbers as follows: (a) up to five members appointed by the Dean from among those persons who shall have recently served on the College or School Promotion Committee, College or School Tenure Committee and/or University Promotion and Tenure Advisory Committee and (b) an equal number elected by the College or School Assembly.

13. After consulting with the chairpersons and the College or School wide merit committee, the Dean shall prepare a list of his/her recommendations for merit awards, the reasons for which the faculty is

being recommended and number of merit units recommended for each person. Each faculty member recommended for merit by the Dean shall be notified of the Dean's recommendation at the time it is forwarded to the Provost or other designated University officer. Faculty members who were recommended by the Department Chair, but not recommended by the Dean, shall receive a letter of notification.

14. The list of faculty members proposed for merit awards and the amount of each merit award recommended shall be forwarded to the Provost or other designated University officer for review and final decision. 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. TAUP shall be provided a list of faculty receiving merit awards no later than May 1.

15. Decisions on the awarding of merit pay by the Provost or other designated University officer shall not be subject to grievance or arbitration.

16. Temple will meet with TAUP during FY2009-2010 to discuss improvements to the merit award system including criteria and processes for broadening eligibility for merit awards. Any changes to existing criteria and processes are subject to ratification by TAUP.

D. Librarians

1. All librarians in the bargaining unit shall be eligible for consideration for merit awards. 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 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. Half units may be awarded after the first unit. Any fraction of a merit unit remaining in the pool shall be rounded up.

3. Nominations for merit awards may be made by librarians themselves, or colleagues, supervisors or Temple.

4. The commencement of the nominating process shall be announced by Temple to all librarians and their supervisors.

5. Uniform written guidelines governing the process of nomination and criteria for recommending librarians for merit awards shall be distributed by Temple to all librarians and their supervisors each year.

6. The Dean of University Libraries or other designated head of the University Libraries shall also consult with a library-wide merit advisory committee consisting of no more than three (3) librarian members who shall be nominated by the Academic Assembly of Librarians and three (3) members who shall be appointed by the Dean or other designated head of the University Libraries.

7. After consulting with the supervisors and the library-wide merit committee, the Dean or his/her designee shall prepare a list of his/her recommendations for merit awards, the reasons for which they are recommended, and the number of merit units for which each person is recommended. Each librarian recommended for merit by the Dean of University Libraries or his/her designee shall be notified of the recommendation at the time it is forwarded to the Provost or other designated University officer. Librarians who are not recommended for merit shall receive a letter of notification.

8. The list of librarians 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. 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. TAUP shall be provided a list of librarians receiving merit awards no later than May 1.

9. Decisions on the awarding of merit pay by the Provost or other designated University officer shall not be subject to grievance or arbitration.

E. Academic Professionals

1. All Academic Professionals in the bargaining unit shall be eligible for consideration for merit awards. 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. Half units may be awarded after the first unit. Any fraction of a merit unit remaining in the pool shall be rounded up.

3. Nominations for merit awards may be made by academic professionals themselves or colleagues, department heads, Deans, or Directors or Temple.

4. The commencement of the nominating process shall be announced by Temple to all academic professionals, and their department heads and/or supervisors.

5. Uniform written guidelines governing the process of nomination and criteria for recommending academic professionals for merit awards shall be distributed by Temple to all academic professionals and their supervisors each year.

6. 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, and the number of merit units for which each person is

recommended. Each academic professional recommended for merit by the Dean or Director shall be notified of the recommendation at the time it is forwarded to the Provost or other designated University officer. Academic professionals who are not recommended for merit shall receive a letter of notification.

7. 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. TAUP shall be provided a list of academic professionals receiving merit awards no later than May 1.

8. Decisions on the awarding of merit pay by the Provost or other designated University officer shall not be subject to grievance or arbitration.

ARTICLE 22 BENEFITS

A. General

1. All benefits (except as herein modified, amended, or canceled) in existence on the date of the signing of this Agreement shall be continued during the term of this Agreement.

B. Health Insurance Benefits

1. Upon enrollment at the Human Resources Department, all active, full-time bargaining unit members shall become eligible to elect one of the following benefit programs to be effective on the first day of the next month after their date of employment: Independence Blue Cross or Keystone Health Plan East HMO.

2. Prescription coverage shall be available to bargaining unit members participating in either Temple University health insurance plan. Employee co-pays will be as follows for qualified prescription drugs at participating pharmacies:

- a. Generic Drugs – 10% of cost
- b. Preferred Brands – 20% of cost
- c. Brand-Named Drugs – 30% of cost

3. In the event Temple University determines to switch its above-mentioned carriers, an equal (or greater) level of benefit must be maintained. Temple University may elect to offer different options from a single carrier or a single option from a single provider. Prior to making any change, Temple University shall meet and discuss with TAUP.

4. If bargaining unit members experience a qualifying event under COBRA, and elect to exercise their COBRA rights, they shall be required to pay Temple 2% of the premium costs to cover administrative expenses.

C. Shared Health Costs

1. Faculty

a. Subject to section (b) below, each faculty member shall pay the employee contributions of Health Care Premiums as follows:

i. The employee contribution for medical and prescription benefits shall be 23% of the premium for the Plan and coverage elected.

ii. Faculty members with annual base compensation below the “cap amount” shall pay an employee contribution for medical and prescription benefits equal to 20%. The “cap amount” shall be \$76,000.

2. Librarians and Academic Professionals shall pay the employee contributions of Health Care Premiums as follows:

a. The employee contribution for medical and prescription benefits shall be 20% for both single and family coverage for the Plan elected.

3. The parties shall establish a Joint Committee to explore additional methods of health care cost containment.

4. Employee co-pays for office visits shall be \$10.00.

5. If bargaining unit members elect coverage, they shall make contributions on a pre-tax basis.

D. Post-Retirement Health Benefits – FAS 106

1. The current policy for bargaining unit members enrolled in the Post Retirement Benefit Pre-Funding Plan shall remain in effect.

2. Eligible bargaining unit members hired prior to July 1, 2000 who are not currently enrolled in the Post Retirement Benefit Pre-Funding Plan shall be eligible to enroll in the Plan for retiree medical and prescription drug benefits.

3. Bargaining unit members hired after June 30, 2000 shall not be eligible for the Post Retirement Benefit Pre-Funding Plan.

4. "Transitional" retiree health insurance benefits shall be made available to eligible bargaining unit members eligible for either D.1. or D.2. above. Under this Program an eligible retiree (and spouse, if he or she is married at time of retirement) shall be provided with three (3) years of health insurance coverage as provided under the current Post Retirement Benefit Plan free (i.e. no pre-funding is required). After 3 years from the date of retirement, health insurance coverage for the bargaining unit member (and spouse, if applicable) shall end.

5. In the event an eligible bargaining unit member elected D1. or D.2. above, and has made contributions to the Post Retirement Benefit Pre-Funding Plan, and then elects D.4. above, those contributions will be returned with interest at the time of retirement. To discontinue participation in the Post-Retirement Benefit Pre-Funding Plan, those contributions will be refunded with any actual interest earned at the time of retirement, separation from Temple, or as a result of divorce or death of a spouse.

E. Dental Benefits

1. Upon enrollment at the Human Resources Department all active, full-time bargaining unit members shall become eligible to enroll in the current Dental Plan.

2. In the event Temple University determines to switch its above-mentioned carriers, an equal (or greater) level of benefit must be maintained. Temple University may elect to offer different options from a single carrier or a single option from a single provider. Prior to making any change, Temple University shall meet and discuss with TAUP.

3. The annual maximum under the current dental program is \$2,000.

4. The lifetime orthodontia maximum under the current dental program is \$2,500.

5. Full-time bargaining unit members shall pay the employee contributions at the same percentage rate as the employee contributions for Health Care Premiums under Section C. above. If bargaining unit members elect coverage, they shall make contributions on a pre-tax basis.

6. Dental Clinic Program

a. All bargaining unit members and eligible dependents may apply to have professional dental care done at Temple's School of Dentistry under the Dental Clinic Program. If accepted by the clinic for coverage under the Program, all deductibles and co-insurance provisions will be waived and the bargaining unit member will have to complete any claim forms as required.

F. Medical Spending Account/Dependent Care Spending Account

1. Each eligible bargaining unit member shall be eligible to contribute up to the maximum amount permitted by law on a pre-tax basis, to a Medical Spending Account to pay for qualified medical expenses and/or a Dependent Care Spending Account.

G. Sick Leave Policy

1. Faculty

a. Requests for sick leave pay must be accompanied by medical documentation acceptable to Temple's Human Resources Department. Temple may seek independent medical examinations to verify eligibility for sick leave.

b. Faculty eligible for receipt of sick leave pay shall be limited to six (6) months.

c. For faculty the following sick leave provisions shall apply: Temple shall pay full salary for the first two months and half salary for the next four months of sick leave. During this period, all benefits shall be continued in the normal manner.

d. In the case of pregnancy, a female faculty member shall be entitled to use eight (8) weeks of sick leave. As per the Sick Leave Policy (Section G.1) an eligible faculty member may be entitled to additional sick leave with medical justification. Without medical justification, the female faculty member can apply for an additional leave of up to four (4) weeks on an unpaid basis to care for a newborn as provided by the Family and Medical Leave Act. (Refer to Section G.6)

2. Academic Professionals and Librarians

a. An academic professional or librarian who has completed the first ninety (90) days of employment will accrue sick days in accordance with the Sick Leave Policy for University Employees.

b. There will be no cap on the number of sick days earned and accrued. In no event, however, will the use of paid sick days coincide with periods of short or long-term disability.

c. During a paid sick leave period, all benefits shall be continued in the normal manner.

d. All academic professionals and librarians who have completed their first ninety (90) days of employment shall be entitled to the Temple Sickness and Accident Plan of \$225 per week for 26 weeks.

3. Any member of the bargaining unit on sick leave shall not lose eligibility to apply for long-term disability in the event that the six-month period required to apply for the long-term disability extends beyond the termination of his/her employment contract.

4. For those receiving salary/sick pay, Temple shall continue to contribute toward all of the bargaining unit member's benefits. In the event a faculty member's appointment has ended, Temple shall not continue to fund benefits beyond the expiration of the employment contract. In the event that the faculty member applies for LTD and is approved, benefits will be reinstated coincident with the LTD effective date.

5. In the event of catastrophic illness, any bargaining unit member may request an extension of sick leave by applying to the Benefits Appeal Committee.

6. In accordance with federal law all bargaining unit members who meet qualifying criteria are eligible for up to 12 weeks of Family and Medical Leave annually.

7. Credit towards tenure or the completion of the probationary period will not accrue during any paid or unpaid sick or University-approved personal leaves of absence.

H. Family and Medical Leave

1. All eligible bargaining unit members are eligible for up to 12 weeks of Family and Medical Leave. Eligibility shall be interpreted by the Family and Medical Leave Act of 1993.

2. Eligible employees are able to take up to twelve weeks of leave to care for a newborn or newly adopted child, to recuperate from their own serious illnesses or to care for a seriously ill family member. For purposes of this policy, "family members" include: (1) the employee's spouse, (2) the employee's parent, (3) the employee's natural

or adopted child or dependent stepchild. Such leave may be paid or unpaid, in accordance with Temple University policy.

I. The parties shall establish a Joint Committee to explore and recommend establishment of enhanced child care policies.

J. Long Term Disability

1. Bargaining unit members may purchase long-term disability benefits. The long-term disability benefit shall be 60 percent (60%) of the member's monthly base salary to a monthly maximum disability benefit of \$4,000, after six months of continuous service. Any bargaining unit member electing coverage shall contribute fifty percent of the cost of this coverage; Temple shall contribute the remainder.

K. Life Insurance

1. The non-contributory life insurance benefit shall be \$18,000.

2. Eligible members of the bargaining unit shall be given the opportunity to purchase additional term life insurance at the prevailing rate equal to 1½ times, 2 times, or 3 times his/her current salary up to a maximum of \$300,000 (in addition to the non-contributory insurance). Such coverage shall be rounded up to the next thousand dollars. The amount of additional insurance coverage shall be increased automatically to take base salary increments into account on the effective date of such increments. After initial enrollment at the time of employment, any request for an increase in coverage must be submitted for approval to the insurance carrier with proof of medical evidence of insurability.

3. Employees who do not enroll for the additional coverage of 1½, 2 or 3 times salary at the time of initial benefit election are subject to insurability provisions.

L. Pension

1. Tenured and Tenure-Track Faculty/ Librarians/ Academic Professionals

a. Each bargaining unit member shall be eligible upon initial hire or during any June (effective July 1) or any December

(effective January 1) to participate in a Defined Contribution Plan or Fidelity Investments). For the tenure-track faculty and clinician educators, as defined in Section XII of the Faculty Handbook as approved by the Board of Trustees of Temple University on June 29, 1995, who were employed as of October 15, 2004, Temple shall contribute 8.5 percent of the bargaining unit member's base salary and the bargaining unit member shall contribute 4.5 percent of his/her base salary below the maximum for social security taxes into his/her individually vested retirement account in a defined Contribution Plan (TIAA-CREF or Fidelity Investments). Temple shall contribute 13 percent and the bargaining unit member shall contribute 5 percent of his/her base salary above the maximum for social security taxes into his/her individually vested retirement account in TIAA/CREF.

b. Temple shall make the payments each month to each bargaining unit member's individually vested retirement account in a Defined Contribution Plan (TIAA-CREF or Fidelity Investments). All new participants in the Temple pension program shall have the University portion of their pension contributions vested after three years. Faculty and librarians who are recruited from other institutions and who were previously vested in a 403-b type plan shall be vested immediately upon enrollment in the University program.

2. Grandfathering of Nontenure-Track Faculty

a. All nontenure-track faculty who were hired prior to October 16, 2004 as "clinician educators" or as "special appointment faculty" and who were participating in the Defined Contribution Plan as of October 15, 2004 shall continue to participate under the same terms and conditions of their participation as existed on October 15, 2004.

3. Nontenure-Track Faculty

a. Eligible nontenure-track faculty members may elect to participate in a defined contribution plan. Nontenure-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 nontenure-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 receive an employer match of up to three percent (3%) of base salary for the first year of participation; up to four percent (4%) for the second year. Thereafter, the employer's matching contribution shall be up to a maximum of four and one-half percent (4.5%) of base salary.

c. Vesting: Plan participants shall vest in Temple's Defined Contribution Plan after three (3) years of service.

M. Early Retirement

1. Any bargaining unit member who has had at least ten years of service at Temple and has reached at least age 55 can elect to go on early retirement at the age of 62 or later. The bargaining unit member must notify Temple in writing of the desire to retire early.

a. Upon delivery of the written request, the bargaining unit member may elect to accelerate both his/her contribution (if any) and Temple's contribution in order that at the elected time of retirement, there will be additional contributions to the pension fund.

		Acceleration Rate for Pension Contributions	Each Annual Contribution is Increased to:
Age at which Early Retirement Plan is Initiated	Age 55	12 years paid in 7	12/7 of stated rates.
	Age 56	11 years paid in 6	11/6 of stated rates.
	Age 57	10 years paid in 5	10/5 of stated rates.
	Age 58	9 years paid in 4	9/4 of stated rates.
	Age 59	8 years paid in 3	8/3 of stated rates.
	Age 60	7 years paid in 2	7/2 of stated rates.
	Age 61	6 years paid in 1	6/1 of stated rates.

2. Any bargaining unit member choosing early retirement shall receive, from the date of retirement until age 67, the medical benefits comparable to those to which he/she would be entitled as a current full-time member of the bargaining unit, and term life insurance benefits, both non-contributing and contributing, at the level in existence at the time of early retirement.

N. Transition to Retirement For Faculty

1. Eligibility: Application to participate in the Transition to Retirement Program shall be strictly voluntary and shall be a benefit available to faculty who qualify based on the eligibility requirements.

a. Any full-time faculty member who is 62 years of age or older and who has a minimum of 10 years of service with Temple University shall be able to elect to participate in this Transition to Retirement Program.

2. Eligibility Period: Annually, eligible faculty shall be able to elect to participate in the Transition to Retirement Program by completing an election form and submitting the form to his/her Chair, Dean and to the Vice-Provost for Faculty Affairs. The Chair and the Dean shall make a recommendation to the Vice-Provost based on student/faculty scheduling needs. The Vice-Provost shall then forward the form (whether approved or not approved) to Human Resources and to the TAUP. A Dean making the recommendation not to approve the election shall communicate the decision and the reason for the decision to the faculty member as well as to the Vice-Provost. An election form must be received by December 31 in any given year for participation in the Transition to Retirement Program during the following fall semester.

3. Upon receipt of an approved election form, the Human Resources Department will schedule a time to meet with the faculty member and have the faculty member sign an agreement outlining the terms and conditions of the Transition to Retirement Program. Once signed, the faculty member shall have seven (7) days to revoke the agreement. Thereafter, the agreement shall be irrevocable and the faculty member shall be required to retire as per the date reflected in the agreement. Exceptions shall not be made for any reason.

4. Retirement Transition: A faculty member who participates in the Transition Program will be eligible to carry a zero workload for either the fall or spring academic semester each academic year for a maximum of three (3) academic years: For purposes of the Transition to Retirement Program, the summer semester will not be included. The Dean shall be responsible for assigning workload; the faculty member shall be assigned a full workload that is both reasonable and fair for the semester in which

he/she works. As part of the workload assignment, the Dean shall have discretion over the faculty member's continued participation on committees.

5. The faculty member will receive fifty percent (50%) of his/her salary during this time period, spread out over twelve (12) months. All benefits shall continue during this transition period. Any benefit that is salary based shall be based on the adjusted salary. A faculty member participating in this transition program shall be eligible to receive the annual increases, including merit, and bonuses as per the collective bargaining agreement.

6. A faculty member may request to have the zero workload in either the spring or fall semester of the academic year. However, there is no guarantee of approval for the academic semester requested. The Dean shall make the final determination based on student/faculty scheduling needs. Where a faculty member has not been approved to have the zero workload for his/her requested semester, he/she may participate in the Transition Program for the first academic year approved by the Dean; he/she may then apply for a change to the semester for which he/she has the zero workload for the remaining years of the program participation. Any adjustment shall be in the sole discretion of the Dean and not subject to the grievance/arbitration provisions of the TAUP contract or other dispute resolution process. Where a faculty member chooses not to apply for an adjustment to the academic semester assigned, the schedule of full workload/zero workload or zero workload/full workload shall continue for the duration of the transition period.

7. Recruitment of Faculty: The University shall recruit faculty to replace faculty participating in the Transition to Retirement Program during the semester in which they carry the zero workload. The University may recruit/employ, in the University's sole discretion, adjuncts, nontenure-track faculty and/or tenure-track faculty. The University, in its sole discretion, may decide the number, rank, type of faculty, appointing School or College, appointing department and term of appointment.

8. The University's decisions regarding the faculty hired to replace faculty participating in the Transition to Retirement Program shall not be subject to the grievance/arbitration provisions of the TAUP contract or other dispute resolution mechanism. Faculty participating in

the Transition to Retirement Program will count as one half (0.5) faculty member for the purpose of determining number of faculty for allocation or calculation of certain University benefits and/or programs (e.g., calculation of Sabbaticals).

9. Election of Retirement: Acceptance of a faculty member's election to participate in the Transition to Retirement Program shall be at the discretion of the University based on departmental needs to ensure that every department within each school/college has the ability to meet academic and student needs. A decision to deny the election may not be grieved and shall not be subject to the grievance/arbitration provisions of the TAUP contract or other dispute resolution process.

10. A faculty member not approved for participation in the year in which he/she applies may reapply the following year.

11. The University may amend and/or modify the Transition to Retirement Program after discussion with and approval by TAUP provided such approval is not unreasonably withheld.

O. Liability Protection

1. Temple shall maintain coverage to insure bargaining unit members against liability claims or suits (including coverage against libel and slander claims) in connection with their responsibilities to Temple or at Temple. All such liability coverage shall be in an amount no less than \$1,000,000 per incident.

P. Tuition

1. All bargaining unit members and their dependents are eligible for tuition remission in accordance with the University's Tuition Remission Policy. Spouses of all full-time faculty are eligible for the same tuition benefits.

Q. Leave of Absence

1. If a bargaining unit member is granted a paid leave of absence, the University will continue the member's benefits at the level prevailing while the member was working.

2. If a bargaining unit member is granted an unpaid leave of absence, the employee shall have the option of continuing his/her benefits at his/her own expense during the period of the leave.

3. Regardless of whether the leave of absence is scheduled, unscheduled, paid or unpaid, when the faculty member returns to work mid-semester or is scheduled to leave mid-semester, the Dean of the member's College or School will determine if the faculty member should be assigned alternative duties on a temporary basis for any fraction of the semester that he/she would otherwise be available to teach.

R. Vision Care

1. All members of the bargaining unit and their legally dependent spouses and children shall be enrolled in the Temple Vision Care Program.

2. Each eligible bargaining unit member and his/her legally dependent spouse and children shall be eligible for a twenty-five (25) dollar allowance in lieu of eyeglasses, for contact lenses every year.

S. Vacation Policy for Academic Professionals

1. Full-time employees shall be eligible for vacations with pay each year in accordance with the following schedule:

LENGTH OF FULL-TIME SERVICE AS OF JULY 1	LENGTH OF VACATION
Less than one year but at least six months	One day for each month of service, up to a maximum of ten days

More than one year	Two Weeks
More than three and one-half years	Three Weeks
More than twelve and one-half years	Four Weeks

2. Any academic professional who is presently receiving more generous vacation benefits shall continue to receive them.

T. Paid Leave for Academic Professionals and Librarians

1. An employee shall be granted up to four (4) days (including day after burial) funeral leave with pay for absence necessary to attend the funeral of a member of the employee's immediate family. The following are considered members of an immediate family: spouse, father, mother, child, sister, and brother and dependent stepchild.

2. An employee shall be granted up to three (3) days (including day after burial) with pay to attend the funeral of a father-in-law, mother-in-law, grandparent, grandchild or child of a sibling.

3. An employee shall be granted an absence of one (1) day with pay for attendance of the funeral of a sister-in-law or brother-in-law.

4. An employee shall make every effort to notify his or her supervisor prior to taking leaves. Temple reserves the right to demand proof of any death and relationship for which leave is taken.

U. Domestic Partners

1. Domestic partners certified by Temple pursuant to University policy will be eligible for all health insurance benefits (medical, dental and vision) as well as non-health benefits that would otherwise be available to spouses of bargaining unit members. Children of certified domestic partners will be eligible to receive benefits on the same basis, pursuant to University policy, as the children of bargaining unit members' spouses.

2. Bargaining unit members will make co-pays for University benefits for their certified domestic partners and any covered children that are the same as the co-pays made by bargaining unit members, their spouses, and their covered children.

V. Bookstore Discount

1. Bargaining unit members shall continue to be entitled to discounts in accordance with the current practice.

W. Employee Assistance Program

1. Temple University shall enroll all TAUP bargaining unit members and their dependents/domestic partners in the Ceridian LifeWorks Employee Assistance Program (EAP). This program will provide unlimited phone calls by employees and family members for information and advice ranging from crisis intervention, family counseling, day-care resources, elder care concerns, substance abuse, financial concerns, legal advice, etc.; access to LifeWorks information and referral web-site; referrals to local certified and licensed providers for face-to-face counseling sessions (employees will have five (5) lifetime free counseling sessions per family member per issue); and support in the event of a critical incident and/or traumatic event at work.

X. Work-Life Balance

1. Bargaining unit members are eligible for paid medical leave for the birth of a child for the period of time during which the bargaining unit member is medically unable to perform the duties of her job, in accordance with Article 22, section G.

2. A tenured or tenure-track faculty member who is the primary caregiver to a child five years of age or less who is newly arrived to his/her home will be entitled to the elimination of teaching duties for up to one academic semester without any reduction in pay. The faculty member must request the relief from teaching duties within six months from the date of birth, adoption or placement of a foster child into the primary caregiver's household.

a. Where two faculty members may be considered as primary caregivers, only one will be entitled to the reduction in teaching

responsibilities per child.

b. Relief from teaching is not a leave of absence; the faculty member is expected to meet other normal departmental and University responsibilities including research, advising, and committee membership.

c. The Chair/Dean will not authorize assignment of additional duties during this period.

3. A tenure-track faculty member may request a one year extension to the tenure clock for:

a. The birth of a child, the adoption of a child, or the placement of a child five years of age or less into foster care in the faculty member's household.

b. A serious health condition of the faculty member's family as defined by the FMLA;

c. A serious health condition of the faculty member.

4. The faculty member requesting an extension for one of the above reasons will provide a written request with justification to his/her Chair, Dean and the Senior Vice Provost for Faculty Development and Faculty Affairs. The Provost will make the final determination regarding the approval of extension requests. A maximum of two one-year extensions may be approved for all purposes in accordance with Article 11 section D.

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 discretion.

2. The Provost 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 of the college. The dean shall forward to the Provost or other designated University officer all sabbatical applications along with his/her recommendations.

6. The Provost or other designated University officer will consult with a University Sabbatical Committee consisting of 13 faculty members from the TAUP bargaining unit. Seven (7) 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 should 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. If a tenure-track faculty member's probationary

period has been extended, his/her time to apply for a sabbatical will be adjusted accordingly. 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 sabbaticals that are available in each year, but it is not obligated to award sabbaticals that do not meet the criteria stated in Paragraph 3 above.

9. A tenured or tenure-track faculty member who receives a sabbatical shall not be eligible to apply for another sabbatical until he/she has accrued six (6) additional years of service at Temple, not including any unpaid or paid leaves. A faculty member with fewer than six (6) additional accrued years of service at Temple nonetheless may apply, provided that he/she has secured the prior approval of his/her dean or the Provost. If all sabbaticals for eligible faculty are not used in a particular year, then those with fewer than six (6) years accumulated after his/her last leave who have applied after obtaining approval from the dean or Provost will be considered at the Provost's discretion.

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 up to two (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 also may request that a faculty member who has accrued the required years of service to earn a sabbatical postpone his/her sabbatical for up to two (2) years during which time he/she 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 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 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 written 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 have 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 percent (10%) authorized at the rate of one (1) per ten (10) of the eligible nontenure-track faculty members.

15. A nontenure-track faculty member who receives a sabbatical shall not be eligible to apply for another sabbatical until he/she has accrued ten (10) additional years of service at Temple, not including any unpaid or paid leaves. A nontenure-track faculty member with fewer than ten (10) additional accrued years of service at Temple nonetheless may apply, provided that he/she has secured the prior approval of his/her dean or the Provost. If all sabbaticals for eligible nontenure-track faculty are not used in a particular year, then those with fewer than ten (10) years accumulated after their last leave who have applied after obtaining approval from the dean or Provost will be considered at the Provost's discretion.

16. Sabbaticals shall be awarded to nontenure-track faculty through the same process and based upon the same criteria as for tenured and tenure-track faculty.

17. The percentage of salary and provision of benefits for sabbaticals for nontenure-track faculty shall be the same as for tenured and tenure-track faculty.

18. No sabbatical from the pool available for tenured and tenure-track faculty shall be awarded to nontenure-track faculty, and vice versa.

19. 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 one-hundred percent (100%) of the faculty member's regular Temple salary. Except as provided in the preceding provisions, a faculty member may not, without approval of the Provost or other designated University officer, engage in activities that produce earned income, either from services rendered or otherwise, while on sabbatical from Temple. The Provost or other designated University 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. 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 this section will be ineligible to take additional leaves under this Article for a period of one (1) year following the conclusion of the leave. During this period of ineligibility, time will continue to accrue toward future sabbaticals.

C. A faculty members who is granted a sabbatical or leave described in this Article will be required to return to his/her position at Temple for at least one year.

D. Summer Research Awards

1. There shall be 35 faculty awards annually.

- a. Each award shall carry a \$7000 stipend
2. The selection process shall remain unchanged.

ARTICLE 24 PERSONNEL FILES

- A. Temple shall maintain one official personnel file for each of its bargaining unit members.
- B. The personnel file shall include but not be limited to:
 1. Personal data similar to that on the University Employee Data Form. Records related to employment status, benefits, and payroll will be maintained by Temple as needed;
 2. Documentation of the existence and availability of information related to the employee's academic and professional accomplishments submitted by the individual and placed in the file with the approval of the Dean or appropriate administrator. Such approval shall not be unreasonably withheld;
 3. Records generated by Temple relevant to employment history and personnel decisions affecting the individual's compensation and/or employment status;
 4. Memoranda of discussions, if they exist, between the employee and his/her Department Chairperson or supervisor relating to evaluations of the employee's professional performance signed by both;
 5. Observation reports of the employee's professional performance signed by the observer and the employee;
 6. Written material concerning appointment, reappointment, promotion, tenure, completion of the probationary period, and merit increases.
- C. Anonymous material and material irrelevant to the professional progress of the individual and material known to be false shall not be included.

- D. Material deemed to be derogatory toward an individual's professional conduct, service, or character shall not be placed in the personnel file without first being shown to the individual involved.
- E. Material placed in the official file will be date-stamped, i.e., the date on which it is entered in the file.
- F. Copies of memoranda of transmittal for promotion and tenure shall be included in the official personnel file.
- G. Within five days of receipt of written request to the responsible individual, the employee shall have access to the file with the exclusion of pre-employment material. Such access shall be only in the presence of someone in authority in the office, but the employee may invite one other bargaining unit member to accompany him/her. The text of peer evaluations will be available to the employee, minus identification of the individual who wrote the evaluation.
- H. If a bargaining unit member alleges that some of the contents in his/her file are false, he/she may place a brief statement to that effect in the personnel file.
- I. The file shall, upon request, be open to duly authorized personnel who are charged with responsibility in the areas of evaluation, promotion, tenure, probation, reappointment, or the processing of grievances.
- J. In the event that a file is subpoenaed in accordance with the law, notice shall be sent to the bargaining unit member before examination of the file takes place.

ARTICLE 25 SAFETY AND HEALTH

- A. Temple agrees to continue to make reasonable provisions for the safety and health of bargaining unit members in pursuit of their University recognized professional responsibilities. Temple and TAUP agree to meet and discuss regularly concerning safety and security issues.
- B. All bargaining unit members have a responsibility to comply with existing health and safety standards, procedures and regulations; to attend

training sessions on safety and health-related matters required by applicable laws or Temple policy; and to ensure that the employees and/or students they supervise demonstrate safe work practices and have received appropriate safety training. In addition, all bargaining unit members have a responsibility to refrain from actions that will damage or destroy Temple property or endanger the health, safety and welfare of other persons, or that would expose Temple to legal risk.

**ARTICLE 26
MAINTENANCE OF STANDARDS**

- A. All benefits or contractual salary benefits (except as herein modified, amended, or canceled) in existence on the date of the signing of this Agreement shall be continued.
- B. The current practices with respect to University patent policy shall not be altered during the term of this Agreement without the approval of both the Faculty Senate and Temple.

**ARTICLE 27
MEET AND DISCUSS CONFERENCE**

A. Representatives of Temple and representatives of TAUP shall confer at least once each semester to consider problems concerning this Agreement and other matters of mutual concern. The parties shall agree upon a date for such a conference that shall be mutually convenient and each party shall, within at least ten days of such date, submit to the other party a list of topics to be included on the agenda of the conference. Memoranda of Agreement may be signed at these conferences to interpret, implement, or make minor modifications in this Agreement.

**ARTICLE 28
AGREEMENT CONSTRUCTION**

A. The Article or paragraph titles throughout this Agreement are merely editorial identifications of their related text and do not limit or control that text.

**ARTICLE 29
SAVINGS CLAUSE**

- A. It is understood and agreed that all agreements herein are subject to all applicable laws now or hereafter in effect; and to the lawful regulations, rulings and orders of regulatory commissions or agencies having jurisdiction. If any provision of this Agreement is in contravention of the laws or regulations of the United States or of the Commonwealth of Pennsylvania, such provision shall be superseded by the appropriate provision of such law, or regulation, so long as same is in force and effect; but all other provisions of this Agreement shall continue in full force and effect.
- B. If, at anytime thereafter, a provision once declared invalid shall be valid, then the provision as originally embodied in this Agreement shall be restored in full force and effect.

**ARTICLE 30
DURATION OF AGREEMENT**

- A. This Agreement shall be effective as of October 15, 2008, and shall continue in full force and effect up to and including October 15, 2012.
- B. It shall automatically be renewed from year to year thereafter unless either party shall notify the other in writing at least 90 days prior to the expiration of this Agreement.

IN WITNESS WHEREOF, the parties hereto set their hands.

TEMPLE ASSOCIATION OF UNIVERSITY PROFESSIONALS AFL-CIO LOCAL 4531	TEMPLE UNIVERSITY – OF THE COMMONWEALTH SYSTEM OF HIGHER EDUCATION
Arthur Hochner TAUP President and Chief Negotiator Associate Professor, Human Resource Management	John B. Langel Ballard Spahr LLP Chief Negotiator
Joyce Lindorff TAUP Vice President Associate Professor, Keyboard	Sharon Boyle Assistant Vice President Human Resources Operations
Carol Brigham Librarian, Paley Library	Richard Englert Deputy Provost Dean Undergraduate College
Patricia Hansell Associate Professor (Teaching/Instruction) Anthropology	Deborah Hartnett Vice President, Human Resources
Camellia Keach Associate Professor, Communication Sciences and Disorders	Diane Maleson Senior Vice Provost for Faculty Affairs and Faculty Development
Elaine Mackowiak Professor, Clinical Pharmacy	George Moore University Counsel
Daniel Szyld Professor, Mathematics	Concetta Stewart Dean, School of Communications and Theater
John DiBenedetto TAUP Executive Director	
Terry Kilpatrick TAUP Member Services Coordinator	
Mel Driban American Federation of Teachers National Representative	

SIDE LETTERS

1. **Health Insurance:** Nontenure-track faculty eligible for health insurance shall have the plan and coverage level elected continue through August 31, provided that their employment is not explicitly terminated prior to that date.

2. **Intellectual Property:** This section shall not govern matters covered by the University's Invention and Patent Policy.

The University and TAUP agree to meet and discuss regarding issues related to copyright.

3. **Union Business:** Temple and TAUP hereby agree that Temple shall provide approximately 15 (fifteen) contact (semester) hours of release time each semester for members of the TAUP bargaining unit for such TAUP activities as the processing of grievances and the implementation of the Temple-TAUP contract. One contact hour for a faculty member shall normally be one semester hour course credit; its equivalent for librarian or an academic professional shall be two hours per week for six months. Release time shall not be applied in a manner that would result in any faculty member's being excused from all classroom teaching responsibilities.

The assignment of release time by TAUP to its members shall be subject to the approval of the appropriate Dean, Vice-Provost for Libraries, or appropriate budget unit head for academic professionals. This approval shall not be unreasonably withheld.

4. **Office Space:** Temple shall continue to provide to TAUP, without charge, office space on the Broad and Montgomery campus comparable in size and convenience to that now occupied by TAUP.

5. **Long-Term Disability:** TAUP and Temple agree that for the purposes of Article 12, Section B, just cause shall include disabilities which prevent satisfactory performance of service with or without accommodation and result in the faculty member's being on unpaid long term disability (inactive pay status) of over one year's duration. The position (or an equivalent one in the department) of a tenured faculty member who is terminated for adequate cause under this provision shall not be filled for the period of eighteen months

following termination unless the released faculty member has been offered re-employment in a tenured position (with at least previous rank and salary) and at least one month with which to accept or decline, provided that the faculty member can satisfactorily perform the work required.

This memorandum remains in force and provides that a tenured faculty member who goes onto long-term disability in excess of one year's duration can be terminated after an additional period of eighteen (18) months. Therefore, tenured faculty members cannot lose their right to return to their position until they have been out on sick leave and disability for a total of thirty-six (36) months. At that point, they have lost all return rights.

6. **Timetable for Receipt of Information:** Information shall be provided in electronic form (Excel Worksheet) as well as on paper when more than 10 members are affected. (See Page 100 for Timetable grid.)
7. **Joint Statement of Commitment to Tenure and the Tenure-track:** TAUP and Temple shall express their joint commitment to tenure and the need to have a sizeable complement of tenured and tenure-track faculty in a high-quality research university. On or about November 1st of each year, Temple shall provide TAUP with a report on current faculty searches, including their number, distribution among departments and colleges and distribution by faculty classification, the number of successful searches completed in the past year compared to the number of searches conducted, the number of retirements and resignations among the faculty during the year, the number of nontenure-track faculty each year in each classification, and the number of part-time/adjunct faculty teaching in colleges and schools in the bargaining unit.
8. **Tenure and Promotion Guidelines:** Temple asserts its right to issue guidelines for tenure and promotion at the University level and at the College/School level. TAUP acknowledges Temple's right to do so; such acknowledgment does not imply endorsement.
9. **Non-Waiver of Positions on Grievance/Arbitration of Denial of Promotion:** By making or withdrawing proposals during the course of negotiations, neither Temple nor TAUP has waived its position on

whether denials of promotion are subject to the grievance and arbitration provisions of the Collective Bargaining Agreement.

10. **Part-Time Faculty:** In signing this Collective Bargaining Agreement, Temple maintains that it does not waive its right to challenge TAUP's legal right to bargain with Temple over the terms and conditions of employment for employees outside its bargaining unit, specifically: part-time faculty. TAUP agrees that Temple has not waived the legal right cited above but does not agree on the merits of the challenge.
11. **Insubordination:** "Insubordination" as used in Article 12 is not intended to refer to vigorous and respectful debate.
12. **Librarian Probation and Promotion:** Temple and TAUP agree to establish a joint committee to develop specific criteria for promotion to the various grade levels and for completion of the probationary period for librarians. (See Article 17).
13. **Work Option for Librarians:** In keeping with the intent of the Collective bargaining Agreement while also enabling the Library to budget appropriately, the University has proposed the following:

Offering Librarians a one-time opportunity to elect a 9.6% increase in their base pay rather than the additional four weeks of "scheduled time off." The election will be totally voluntary on the part of the Librarians and would take effect July 1, 2006.

Any Librarian that elects this alternative will have this money added to his/her base pay, and all base benefit calculations including pension will be made with the inclusion of this increase.

This election will stay in effect until such time as the Librarian may determine that he/she would prefer the four weeks of "scheduled time off" over the pay; such a reversion to the four weeks "scheduled time off" would be effective at the start of the fiscal year immediately following. At such time, the Librarian's pay will be reduced by the appropriate amount (8.76% of the increased base pay rate).

For those Librarians electing this choice, an annual election will not be necessary unless the Librarian determines that a change is

desired. However, each spring when Temple schedules the four-week time off for Librarians for the upcoming year, all Librarians who have elected to work and receive pay for the four weeks will be reminded that they have a right under the Collective Bargaining Agreement to take the four weeks in lieu of the increased pay.

The terms of Article 17, Section 3 of the Collective bargaining Agreement will continue to remain in effect.

The University reserves the right to discuss with TAUP at some future date the opportunity for another such election.

14. Librarians Hired for Fixed Periods of Time: The Vice Provost for Libraries may, when appropriate, hire individuals who are professional librarians to work exclusively on grant- and foundation-supported projects for fixed periods of time – generally from one to three years. Such librarians shall not perform tasks normally assigned to probationary or permanent librarians.

Librarians hired specifically for the grant- and foundation-supported projects shall receive contracts of employment from Temple in one-year appointment which can be extended in one-year appointment periods if the grant is extended. The term shall be defined in the offer letter and will also include a three-month probationary period in the first contract year.

Librarians hired specifically for the grant- and foundation-supported projects shall not be subject to an annual contract renewal or promotion review by a peer committee established by the Academic Assembly of Librarians. They shall, however, have clear goals and objectives stated in their initial appointment letters. The librarians shall meet with the Vice Provost for Libraries or his/her designee to discuss their responsibilities and performance in meeting their goals and objectives and shall subsequently receive a written annual performance review from the Vice Provost for Libraries or his/her designee based on those goals and objectives. More frequent performance reviews may occur in the first year of appointment.

While eligible for merit, under no circumstances shall money for merit for a librarian hired to work on a grant- or foundation-

supported project be commingled with the University's merit pool for librarians.

Their employment with Temple shall end at the end of the grant- or foundation-supported project. They shall not be covered by the lay-off provisions in Article 17, Sections E3 and F of the collective bargaining agreement between TAUP and TU.

Should, however, an opening for a full-time librarian exist at the time the employment contract has ended and/or the completion of the specific project for which the librarian was hired, he/she would be eligible to apply for the position. If hired, the librarian will begin the first year of his/her probationary time. Time as a fixed-term librarian will not be counted toward the probationary time, but shall count towards pension vesting and all other benefits.

These librarians shall be represented by TAUP and be covered by the provisions of the collective bargaining agreement for the term of their employment with the exceptions noted in this side letter.

15. Employee Orientations: Temple University agrees that when new employee orientations are coordinated, TAUP shall receive a list of new bargaining unit members scheduled to attend the orientation, including name, department, and contact information. TAUP will receive this list at least two (2) weeks prior to the orientation sessions when feasible. Temple will also assist TAUP in reserving rooms in which to meet with new employees.

16. Work-Life Balance Nontenure-Track Faculty: After three (3) consecutive years of service, a nontenure-track faculty member may request flexibility in work assignments due to circumstances covered by the Work-Life Balance provision (Article 22, Section W) the collective bargaining agreement.

The Dean, in his/her sole discretion, will determine whether to grant the request. The nontenure-track faculty member may request a review by the Office of the Provost, whose decision will be final. TAUP will be notified of any case that is reviewed by the Office of the Provost. Neither the decision of the Dean nor that of the Provost will be grievable or arbitrable.

17. **Work-Life Balance: Tenure-Track Faculty:** A tenured or tenure-track faculty member may request flexibility in research and service due to circumstances covered by the Work-Life Balance provision (Article 22, Section W) of the collective bargaining agreement. The Dean will make the final determination regarding the ability to provide flexibility in assignment; however, the tenured or tenure-track faculty member may request a review by the Office of the Provost. The Provost's decision will be final. TAUP will be notified of any case that is reviewed by the Office of the Provost at the request of a tenured or tenure-track faculty member. Neither the decision of the Dean nor that of the Provost will be grievable or arbitrable.

18. **Life Insurance:** TAUP agrees that the past practice of providing bargaining unit members with \$2000.00 life insurance upon election of participation in the University's Post-Retirement Medical Program will be discontinued for any new faculty electing to participate after May 1, 2006. Any TAUP bargaining unit member who has previously enrolled in this program will continue to receive this benefit, providing he/she continues to participate in the program for the required ten-year period.

Timetable For Receipt of Information Temple University To TAUP

Deadline For TAUP Notification	REASON FOR CHANGE	INFORMATION NEEDED	DATE CHANGE EFFECTIVE
11/01/** Fall Semester	Update of CBU Printout	By college and dept; name, gender, TU employee #, TU zip, TU email, TU phone, DOB, DOH, appt. date, current status, tenure date, rank, annual salary, race, mode of payment, home address and phone	
11/01/** Fall Semester	Promotion/Tenure	Names, Title Changes, New Salary	1/01/**
	Study Leave Spring Semester	Names; new salary	1/01/**
	Year-long study leave Starting 1/01/**	Names; new salary	1/01/**
	Retirement starting Spring Semester (1/01/**-6/30/**)	Names; addresses; End dates	1/01/**-6/30/**
5/01/** Spring Semester	Merit	Names, number of merit units and their categories or reasons	6/01/** (Retroactive to 1/01/**)
	Salary Minima	Names; new salary	7/01/**
	Study Leave Fall Semester (7/01/**-12/31/**)	Names; new salary	7/01/** or 9/01/**
	Year-long study leave (7/01/**-6/30/**)	Names; new salary	7/01/** or 9/01/**
Within 30 Days of Change	Retirement starting Fall Semester (7/01/**)	Names; addresses; End dates	7/01/**
	Promotion (AP or Librarian)	Name, title change; New salary	Variable
	Leave W/O Pay	Name; dates effective	Variable
	Retirement (AP or Librarians)	Names; addresses; End dates	Variable
	New employee	Same info as CBU printout	Variable
Within 10 Days of Change	Transfer within TU	Name, all changes	Variable
	No longer at TU	End date	Variable
Additional Increase	Name; new salary		Variable

INDEX

academic dishonesty 27

academic freedom 3

academic professionals 51-55

 definition 6, 51

 discipline 54

 evaluations 52

 termination of service 52

accident 73

Act 195 4, 7

Affirmative Action 6

American Arbitration Association 12

annual reports 63

arbitration 12

 expedited 12

attorney 33, *See also* legal counsel

attorney's fees 10

benefits 68-83

Blue Cross 68

Board of Trustees

 definition 4

bonus 62, 63, *See also* Stimulus Bonus Payment

bookstore discount 82

budget, Temple 9

bulletin board 8, 13

Calendar *See* University calendar

censorship 3

child

 adoption of 83

 birth of 83

 foster care 83

child care 74

COBRA 69

College or School

 definition 4

conflict of interest policy 62

crisis intervention 82

data, from Temple 8

day-care 82, *See also* child care

days, definition of 28

Defined Contribution Plan 75, 76, *See also* pension

definitions 4-6

denial of promotion 94

dental benefits 71

Department Chairs 42-44

 acting 42

 consultation with for discipline 34

 definition 5

 members of bargaining unit 4

 not members of management 4

 stipends 44

Dependent Care Spending Account 71

disability *See* long-term disability

Disability

 long-term *See* long-term disability

discipline 3

 definition of, faculty 27

discontinuance of a program or department of instruction 34

discrimination 6

dismissal

 tenured and tenure-track faculty 28

dismissal, faculty

 definition 27

domestic partners 81

dues

 authorization card 9

 TAUP 9

Duration of Agreement 91

EAP *See* Employee Assistance Program

elder care 82

Employee Assistance Program 82

Expedited Procedure for Tenure on Hire 26

Faculty

 definition 5

 nontenure-track, definition 5

 tenured and tenure-track, definition 5

Faculty Responsibility Committee 29

faculty searches

 report on 94

Faculty Senate Personnel Committee

 appeal to tenure denial 25

 in disciplinary process 29

fair share 10

Family and Medical Leave 73

family counseling 82

FAS 106 *See* post-retirement health benefits

Fidelity Investments 75

financial exigency 34

Fixed Periods of Time, Librarians Hired for 96

flexibility	
in research and service	98
FMLA	<i>See</i> Family Medical Leave
foster care	<i>See</i> child, foster care
FRC	<i>See</i> Faculty Responsibility Committee
Fulbright	<i>See</i> prestigious fellowships and awards
funeral leave	81
grave misconduct	27
grievance	10-11
academic professionals	55
discipline, nontenure-track faculty	34
discipline, tenured and tenure-track faculty	32, 33
Guggenheim	<i>See</i> prestigious fellowships and awards
health insurance	68
nontenure-track faculty	93
incompetence, professional	27
increase, promotion	<i>See</i> promotion increase
Increased compensation	61
information, from Temple	8
insubordination	95
Intellectual Property	93
Invention	93
Joint Committee	
child care policies	74
diversity	6
health care cost containment	70
librarian probation and promotion	95
just cause	
academic professionals	53, 54
faculty	27
librarian	50
long-term disability	93
Keystone Health Plan East HMO	68
leave of absence	80
legal advice	82
legal counsel	31, 33, <i>See also</i> attorney
liability protection	79
libel	
liability protection	79
librarians	44-50
contract renewal	45
definition	5
evaluation of	49
fixed period of hire	48
grant and foundation supported projects	48, 96

hired for fixed periods of time	96
probationary period	46
promotion	45
promotion criteria	46
regular appointment	45
termination of service	49
<i>work option</i>	95
life insurance	74, 98
LifeWorks	82
lockout	12, 13
long-term disability	73, 74, 93
LTD	<i>See</i> long-term disability
Management rights	<i>See</i> Temple, rights of mediation
nontenure-track faculty	33
tenured and tenure-track faculty	28, 32
Medical Spending Account	71
Meet and Discuss	90
merit	
academic professionals	67
faculty	63
librarian hired for fixed period of time	96
librarians	65
No Strike/No Lockout	12-13
nontenure-track faculty	
appointment and reappointment	40
classifications	40
discipline/dismissal	33
health insurance	93
pension	75
promotion standards and procedures	
renewal or nonrenewal	39
office space	
TAUP	93
orientations	97
outside compensation	
non-Temple work	61
overload teaching	
compensation for	60
Paid Leave for Academic Professionals and Librarians	81
part-time faculty	37, 95
patent	90, 93
pension	74-76
nontenure-track faculty	75
nontenure-track faculty, grandfathering	75

Tenured and Tenure-Track Faculty/ Librarians/ Academic Professionals	74
personnel files	88-89
Pew	<i>See prestigious fellowships and awards, See</i>
post-retirement health benefits	70
pregnancy	72
prescription coverage	68
prestigious fellowships and awards	87
promotion	
external evaluations	16
guidelines	94
increase	59
Promotion and Tenure Standards and Procedures for Faculty	14-27
recognition of TAUP	3-4
release time	93
remission, tuition	<i>See tuition remission</i>
reprimand	
oral	27
written	27
research	
for pecuniary return	3
retirement	
early	76
transition to	77
retrenchment	34-38
academic professionals	53
faculty	34
librarians	49
notice of	36
rights of Temple	6-8
sabbaticals	83-87
safety and health	90
salary	
adjustment pool	61
increase	62
minima	58
severance	37
salary increases	62-68
scheduled time off	46, 95
severance salary	39
SFSF	<i>See State Fiscal Stabilization Funds</i>
sick leave	
academic professionals and librarians	72
faculty	72
slander	
liability protection	79

State Fiscal Stabilization Funds	62
Stimulus Bonus Payment	62, 63, <i>See also bonus</i>
STO	<i>See scheduled time off</i>
strike	12, 13
substance abuse	82
Summer Research Awards	87
summer school	
compensation for	60
suspension without pay	
tenured and tenure-track faculty	28
suspension without pay, faculty	
for fewer than 45 days	33
TAUP	
definition	5
participation in activities of	9
TAUP representative	33
right to	28, 31, 33
TAUP, rights of	8-9
teaching responsibilities, relief from	83
Temple	
rights of	6
tenure	
eligibility	20
external evaluators	23
grievance and arbitration	26
guidelines	94
levels of review	21
on hire	26
procedures	21
review of progress toward	21
standards	19
tenure clock, extension of	83
tenure-track faculty	
renewal or nonrenewal	39
termination of service	
tenured and tenure-track faculty	27
terms and conditions of employment	4
TIAA-CREF	75
transition to retirement	<i>See retirement, transition to</i>
tuition	
remission	79
University Calendar	57
university supported research	83-88
University Tenure and Promotion Advisory Committee	14
vacation	

academic professionals.....	80
librarians.....	<i>See</i> scheduled time off
vesting	
librarian hired for fixed period of time	97
nontenure-track faculty pension.....	76
vision care.....	80
work-life balance.....	82
nontenure-track faculty.....	97
tenure-track faculty	98
workload.....	55-58
faculty.....	55
librarians and academic professionals.....	58
reduction.....	55

Faculty 68
Faculty for fixed period of time 67
Faculty-track faculty position 76
Faculty 80
Faculty 82
Faculty-track faculty 81
Faculty 88
Faculty 85
Faculty 86
Faculty 84
Faculty 83
Faculty 87
Faculty 89
Faculty 90
Faculty 91
Faculty 92
Faculty 93
Faculty 94
Faculty 95
Faculty 96
Faculty 97
Faculty 98
Faculty 99
Faculty 100

