

# Summary of Major Personnel Actions and Other Procedures, AY 2023-2024

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

*Unit administrators who are not clear as to the application of these terms to their unit in this document should refer their questions to the provost's office.*

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- B. Librarian Annual Reports

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- B. Request for exception to Board of Trustee policy on required return from AY 23-24 sabbatical leave
- C. Request for exception to Board of Trustee policy on immediate return from AY 23-24 sabbatical leave

## III. REAPPOINTMENTS

- A. Reappointment to 2<sup>nd</sup> Probationary Year (AY 2023-2024 = 1<sup>st</sup> Probationary Year)
- B. Reappointment to 3<sup>rd</sup> Probationary Year (AY 2023-2024 = 2<sup>nd</sup> Probationary Year)
- C. Reappointment to 4<sup>th</sup> or 5<sup>th</sup> Probationary Year (AY 2023-2024 = 3<sup>rd</sup> or 4<sup>th</sup> PY)
- D. Reappointment through 6<sup>th</sup> Probationary Year (through Tenure Decision Year, also called "Fourth Year Review")
- E. Reappointment with Tenure (Tenure Decision Year = AY 2023-2024)

## IV. PROMOTIONS

- A. Tenured Faculty Promotion from Associate Professor to Full Professor (without tenure consideration)
- B. Non-Tenure Track Faculty Promotions to senior ranks
- C. Librarian Promotion to all ranks

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

## VI. EMERITUS

## I. ANNUAL REPORTS

(The AFR can be accessed electronically at this website: [http://www.umb.edu/faculty\\_staff/afr](http://www.umb.edu/faculty_staff/afr))

### A. Annual Faculty Reports (AFRs)

#### September 2023

**18** Reports from faculty to chairperson with appropriate sections completed; chairperson passes the reports to personnel committee

#### October 2023

**02** Personnel committees return reports to chairperson with appropriate sections completed

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

**16** Reports (with signature) returned by faculty to chairperson

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

### B. Librarian Annual Reports

#### September 2023

**12** Reports from librarians to immediate supervisor with appropriate sections completed

**15** Annual reports returned to librarian for signature/comments

#### October 2023

**02** Reports provided to Library Personnel Committee with comments of supervisor

**20** Reports from personnel committee to dean for review/comments

#### November 2023

**03** Reports from dean to librarian for final signature/comments

**08** Annual reports from librarian (with final signature) forwarded to dean

## II. LEAVES OF ABSENCE

### A. Applications for AY 24-25 Sabbatical Leaves and Leaves With or Without Pay

#### October 2023

**26** Applications for sabbatical leaves or leaves of absence for AY 24-25 from faculty to chairperson and from librarian to associate dean of university libraries

#### November 2023

**17** Recommendations regarding sabbatical leaves and leaves of absence for AY 24-25 from chairperson/associate dean of university libraries to dean

#### December 2023

**13** Sabbatical reports from Spring 23 due to provost

#### January 2024

**20** Recommendations regarding sabbatical leaves and leaves of absence for AY 24-25 from dean to provost

#### April 2024

**01** Notification to faculty/librarians regarding sabbatical or leaves of absence for AY 24-25

#### May 2024

**01** Requests for modifications in period of sabbatical leave during AY 24-25 from applicant to chairperson. (NOTE: requests for changes from full-year to one-semester sabbaticals will normally not be granted if submitted after this date)

**08** Requests for modification in period of sabbatical leave during AY 24-25 from chairperson/department head to dean

Sabbatical reports from Fall 23 due to provost

**14** Requests for modification in period of sabbatical leave during AY 24-25 from dean to provost

#### June 2024

**14** Notification to faculty and librarians regarding requests for modification in period of sabbatical leave during AY 24-25

## **B. Request for exception to Board of Trustee policy on required return from AY 23-24 sabbatical leave**

### **September 2023**

**04** Request from faculty or librarian to chairperson or department head in cases in which the sabbatical leave ends before 1/21/24 (NOTE: requests made after this date will normally not be considered)

**11** Requests from chairperson/department head to dean in cases in which the sabbatical leave ends before 1/21/24

**15** Requests from deans to provost in cases in which the leave ends before 1/21/24

### **October 2023**

**03** Requests from provost to chancellor in cases in which the sabbatical leave ends before 1/21/24

**10** Requests from chancellor to president in cases in which the sabbatical leave ends before 1/21/24

### **November 2023**

**29** By this date, notification to faculty or librarians regarding decision on request for exception to Board of Trustee policy on required return from sabbatical leave which ends before 1/21/24

### **January 2024**

**26** Requests for exception to Board of Trustee policy on required return from sabbatical leave from faculty or librarian to chairperson or department head in cases of faculty or librarians on leave for AY 23-24 or on leave in the Spring 2024 semester.

### **February 2024**

**01** Requests from chairpersons/department heads to dean

**08** Requests from dean to provost

**22** Requests from provost to chancellor

### **March 2024**

**08** Requests from chancellor to president

### **June 2024**

**21** By this date, notification to faculty members or librarians regarding decision on requests for exception to Board of Trustee policy on required return from AY 23-24 sabbatical leave

## C. Request for exception to Board of Trustee policy on immediate return from AY 23-24 sabbatical leave

### September 2023

**05** Requests from faculty or librarian to chairperson or department head in cases in which the sabbatical leave ends before 1/21/24 (NOTE: requests made after this date will normally not be considered)

**11** Requests from chairperson/department head to dean in cases in which the sabbatical leave ends before 1/21/24

**15** Requests from dean to provost in cases in which the sabbatical leave ends before 1/21/24

### October 2023

**03** Requests from provost to chancellor in cases in which the sabbatical leave ends before 1/21/24

**10** Requests from chancellor to president in cases in which the sabbatical leave ends before 1/21/24

### November 2023

**30** By this date, notification to faculty or librarians regarding decision on request for exception to Board of Trustee policy on immediate return from sabbatical leave which ends before 1/21/24

### January 2024

**26** Requests from faculty or librarian to chairperson/department head in cases of faculty or librarians on leave for AY 23-24 year or on leave in the Spring 2024 semester

### February 2024

**01** Requests from chairperson/department head to dean

**08** Requests from dean to provost

**22** Requests from provost to chancellor

### March 2024

**07** Requests from chancellor to president

### June 2024

**21** By this date, notification to faculty or librarians regarding decision on requests for exception to Board of Trustee policy on immediate return from AY 23-24 sabbatical leave

### III. REAPPOINTMENTS

#### A. Reappointment to 2nd Probationary Year (AY 2023-2024 = First Probationary Year)

##### September 2023

**06** Chairs receive materials from faculty for personnel reviews scheduled during AY 23-24 and confirm to dean the faculty members being reviewed

##### February 2024

**01** Recommendations regarding reappointment to 2nd PY from department to dean

**07** Recommendations on reappointment to 2nd PY from dean to provost

##### March 2024

**01** (\*) By this date, notification of reappointment or expiration of appointment of probationary faculty in 1st service year (those whose current contracts expire 8/31/24) from Delegated Appointing Authority to candidates (with copies to intervening administrators)

#### B. Reappointment to 3rd Probationary Year (AY 2023-2024 = Second Probationary Year)

##### September 2023

**08** Chairs received materials from faculty for personnel reviews scheduled during AY 23-24 and confirm to dean the faculty members being reviewed

##### October 2023

**27** Recommendations regarding reappointment to 3rd PY from chair to dean

##### November 2023

**13** Recommendations regarding reappointment to 3rd PY from dean to provost

##### December 2023

**15** (\*) By this date, notification of reappointment or expiration of appointment of probationary faculty in 2nd service year (those whose current contracts expire 8/31/24) from Delegated Appointing Authority to candidate (with copies to intervening administrators)

### C. Reappointment to 4th or 5th Probationary Year (AY 2023-2024 = 3rd or 4th PY)

#### September 2023

**08** Chairs receive materials from faculty for personnel reviews scheduled during AY 23-24 and confirm to dean the faculty members being reviewed

#### March 2024

**22** Recommendations for reappointment to 4th or 5th PY from department to dean

#### April 2024

**19** Recommendations for reappointment to 4th or 5th PY from dean to provost

#### August 2024

**15** (\*) By this date, notification of reappointment or expiration of appointment of all probationary faculty whose current contracts expire 8/31/24 from Delegated Appointing Authority to candidates

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

#### September 2023

**08** Chairs receive materials from faculty for personnel reviews scheduled during AY 23-24 and confirm to dean the faculty members being reviewed

#### November 2023

**16** Recommendations regarding reappointment through the 6th Probationary Year (Fourth Year Review) from chairperson to dean for distribution to the college personnel committee

#### February 2024

**01** Recommendations regarding reappointment through the 6th PY (Fourth Year Review) from college personnel committee to dean

#### March 2024

**01** Recommendations for reappointment through the 6th PY (Fourth Year Review) from dean to provost

#### May 2024

**15** Notification of reappointment through the 6th PY (Fourth Year Review) to faculty members

## August 2024

**15** (\*) By this date, notification of reappointment or expiration of appointment of all probationary faculty whose current contracts expire 8/31/24 from Delegated Appointing Authority to candidates

## E. Reappointment with Tenure (Tenure Decision Year = AY 2023-2024)

### September 2023

**08** Chairs receive materials from faculty for personnel reviews scheduled during AY 23-24 and confirm to dean the faculty members being reviewed

**11** Tenure files from chairperson to department personnel committee for review

### October 2023

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

**16** Recommendations regarding tenure from chairperson to dean for distribution to college personnel committee

### November 2023

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

### January 2024

**12** Recommendations regarding tenure from dean to provost

### March 2024

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

### April 2024

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

### June 2024

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

### August 2024

**15** (\*) By this date, deadline for notification of Expiration of Appointment (8/31/24) in tenure cases in which the chancellor does not recommend tenure to the President and the Board of Trustees



## IV. PROMOTIONS

### A. Tenured Faculty Promotion from Associate Professor to Full Professor (without tenure consideration)

#### September 2023

**08** Chairs receive materials from faculty for personnel reviews scheduled during AY 23-24 and confirm to dean the faculty members being reviewed

**12** Promotion files for rank of full professor from chairperson to departmental personnel committee

#### January 2024

**15** Promotion files rank of full professor from department personnel committee to department chair

#### February 2024

**01** Recommendations regarding promotions to rank of full professor (without tenure consideration) from chairperson to dean for distribution to college personnel committee

#### March 2024

**01** Recommendations regarding promotions to rank of full professor (without tenure consideration) from college personnel committee to dean

#### April 2024

**05** Recommendations regarding promotions to rank of full professor from dean to provost

**23** Written notification from tenured faculty members to chairperson of intent to submit name for promotion to full professor in AY 24-25

#### August 2024

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

### B. Non-Tenure Track (NTT) Faculty Promotion to senior rank (Senior Lecturer, Senior Lecture II and III)

#### January 2024

**26** Chairs receive materials from NTT faculty for personnel reviews scheduled during AY 23-24 and confirm to dean the faculty members being reviewed

**30** NTT faculty promotion files from chairperson to departmental personnel committee

**February 2024**

**20** NTT promotion files from department personnel committee to department chair

**March 2024**

**08** Recommendations regarding NTT faculty promotions from chairperson to dean for distribution to college personnel committee

**April 2024**

**17** Recommendations regarding NTT faculty promotions from college personnel committee to dean

**May 2024**

**15** Written notification from NTT faculty member to chairperson of intent to submit name for promotion to senior rank in AY 24-25

**17** Recommendations regarding NTT faculty promotions from dean to provost

**August 2024**

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

**C. Librarian Promotions (to all ranks)**

**November 2023**

**29** Written notification from librarian to dean of intent to submit name for promotion

**January 2024**

**23** Materials for librarian promotion files submitted to supervisor

**February 2024**

**08** Recommendations regarding librarian promotions from supervisor to personnel committee

**March 2024**

**07** Recommendations regarding librarian promotions from personnel committee to dean

## April 2024

- 05** Recommendations regarding promotions from dean to provost

## August 2024

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

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

### February 2024

- 02** By this date, faculty scheduled for PMYR submit their 2000 word (or less) statement and CV to departmental personnel committee and chairperson, and chairperson provides personnel committee with annual reports and student evaluations for PMYR faculty

### March 2024

- 01** Recommendations of personnel committee and chairperson to PMYR faculty and dean

### April 2024

- 17** Deans submit recommendations to PMYR faculty, personnel committee, and chairperson
- 19** PMYR development plans, if needed, submitted from faculty to dean

### May 2024

- 02** Chairpersons submit names of faculty eligible for PMYR in AY 24-25 to dean (for reporting to provost). Chairpersons are responsible for ensuring that such faculty members are aware of their rights and responsibilities.

- 10** Deans submit annual PMYR report to provost for faculty reviewed during AY 23-24

## VI. EMERITUS

### June 2024

- 03** Recommendation for emeritus status from department chair to dean
- 14** Recommendation for emeritus status from dean to provost

### August 2024

- 15** Notification of emeritus status from provost to retiree, dean, and department chair