DATE: April 4, 2019

TO: Deans and Directors

FROM: Sarah Mangelsdorf, Provost and Vice Chancellor for Academic Affairs

RE: UW-Madison Summer Term Employment Policy

The current summer employment policy requires that the maximum summer salary earned by faculty, academic staff, and limited appointees on an academic year (9-month) appointment may not exceed eight month's summer salary (8/9th rule) over any three-year period without approval of Provost (or designee).

To stimulate more summer teaching and research, I am delegating the ability to approve exceptions to exceed eight month's summary salary over any three-year period to deans and directors. This delegation is effective with the 2019 summer term.

As a result of the delegation, we would expect to see more faculty and staff participating in additional teaching and research during the summer. Summer Term courses should provide students more flexibility in their schedules while staying on track to graduate in four years. Any additional summer research will contribute toward UW-Madison retaining our national research ranking.

Following this memo are both guidelines for reviewing and approving these exceptions to the 8/9th rule and the current campus policy for summer appointments.

The delegation flexibility is part of overall efforts to encourage faculty and staff to provide more teaching and pursue additional research opportunities in the summer. This strategy is consistent with our peer institutions. If you have any questions regarding this delegation or funding, please contact the Office of Human Resources (OHR) or Research and Sponsored Programs, as appropriate.

Thank you for your continued support for the expansion of our summer term activities.

Attachments:
1. Process Guidelines for Summer Term Employment – 8/9ths Exceptions
2. HR Policy 11.03 – Summer Appointments for Faculty, Academic Staff, and Limited Appointees on C-Basis

cc: Laurent Heller, VC for Finance and Administration
        Mark Walters, Chief Human Resources Officer

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Process Guidelines for Summer Term Employment – 8/9th Exceptions
April 2019

The following guidelines should be used in evaluating and approving any exceptions to the 8/9th rule:

- Dean/director with delegated authority will review and approve or deny justifications for any faculty or staff on an academic year (9-month) appointment who will exceed eight month's summer salary over any three-year period. (See Note regarding Overloads below.)

- The offices of the deans/directors will work closely with departments/centers to determine the appropriateness of the request. For example, is the research advancing the mission of the school/college? Will the course proposed accelerate a student's time to degree?

- Per the campus policy (11.03 - Summer Appointments for Faculty, Academic Staff, and Limited Appointees on C-Basis), each college, school, or division will establish its own form of documentation (justification, form, etc.).

- As a reminder, University Committee approval is required when academic staff are asked to perform both research and teaching. See Guidelines for Submitting Requests for Rule Waivers (under "D. Dual Role appointments for academic staff").

- In the spring semester, reports will be provided to departments/centers and the Dean/Director regarding prior summer appointments to assist in identifying possible exceptions for the upcoming summer.

- If there are any questions or issues regarding faculty and staff on federal and non-federal sponsored funding who are likely to exceed 2/9th in a given summer, please consult with Research and Sponsored Programs (www.rsp.wisc.edu).

- Approvals of all summer activity exceptions should occur prior to the start of the summer calendar.

Note: Faculty, academic staff, and limited appointees on an academic year (9-month) appointment typically are ineligible to earn overload payments during any summer when they earn 3/9ths summer salary. Requests for an exception to this policy still requires prior approval of the Provost (Overload designee).