

Print on departmental letterhead

MEMORANDUM OF UNDERSTANDING

Joint-Appointment Agreement for **insert faculty name
College of XXX
insert academic home department and
insert program or non-academic department (sharing unit)**

Prior to the development of the joint appointment, a Memorandum of Understanding between the sharing unit and the home department must be developed which addresses the specific critical elements listed below. The Memorandum of Understanding must identify or state:

a. Units involved in the joint appointment.

Department of **insert academic home department** (Home Department) and **insert program** (Sharing Unit)

b. Home department of the jointly appointed individual. The academic home department will have the lead responsibility in the management of personnel issues and coordination of annual performance evaluations, merit decisions, tenure, and promotions in rank reviews as may be applicable for the particular individual. For tenure-track or tenured faculty, the commitment of tenure and rank will be within the academic home department. Often but not always, the home department will be the department with the higher workload fraction. As a general guide, the designated home department should also be the department that is most relevant to the individual's discipline/expertise area, inclusive of the area of intellectual / creative pursuits, and that which the individual feels the closest identity.

c. Terms of the appointment, e.g., academic year, twelve months, etc.

Academic year

d. Tenure status of the appointment, e.g., tenured, tenure track or non-tenure track.

Insert tenure status

e. Rank or title of the applicant for the appointment.

Insert rank

f. Workload distribution between the two units and whether this is for the duration of the joint appointment or up for review at designated times; if the latter, state the times.

X% academic home department, Y% sharing unit.

The Y% sharing unit workload will be made up of teaching, scholarship and service. The basic teaching load will be three courses per semester during the academic year (3/3), [insert #] for home department and [insert #] for sharing unit.

Reassignments may be negotiated with the department Chair, Program Director/Unit Head and/ or Dean. The primary service requirement for the position will be in the sharing unit with a rough distribution of 1/3 to the home department and 2/3 to the sharing unit. This priority may be modified in the Faculty Performance Agreement, in consultation with the home department Chair and the sharing unit Director/Unit Head, as service needs of the home department or sharing unit change. The faculty member's scholarship will be in line with college and departmental guidelines and may be either disciplinary or interdisciplinary, or both. This workload description should be reflected in the annual Faculty Performance Agreement, in consultation with the Chair of the home department and the sharing unit Program Director/Head.

g. Eligibility criteria and expectations regarding membership on unit level committees.

The joint appointee is eligible for membership on committees in either units; service on sharing unit committees should take priority in line with the workload guidelines outlined above.

h. Joint appointee's office location, access to instructional support materials, secretarial support, and research support.

Understanding that office assignment falls under the purview of the Office of the Dean College of XXX (or sharing unit supervisor), the joint appointee's office should be located in an appropriate location that allows convenience to support services. Support services can come from either unit, consistent with the work being done. For example, support for teaching in the home department should come from the home department's support service; likewise, teaching for the sharing unit should be supported by the sharing unit's support services.

i. Method in which the home department will modify their evaluation and review processes for annual review, tenure, promotion, and post-tenure review as applicable to be inclusive of the sharing unit's input on performance.

The home department Chair will consult with the Director/Head of the sharing unit in completing the faculty member's annual review and other reviews* (e.g., for merit pay increases). The faculty member's scholarship will be in line with college and departmental guidelines and may be either disciplinary or interdisciplinary, or both. The faculty member's Annual Review Documents (ARDs) will include separate assessments by the Chair of the home department and the Director of the sharing unit. Also, as part of the normal review process, the Director/Head of the sharing unit and the Chair of the home department will both provide an independent assessment of the faculty member's performance in their respective areas for third-year, tenure, and promotion reviews. For third-year, tenure, and promotion reviews, the review committee will include three members from the home department, and two members from the sharing unit, or any other approved College of XXX procedures for establishing such committee.**

When reviewing joint-appointees, review committee members will follow departmental tenure and promotion guidelines from the home department.

The faculty member agrees that the home department Chair will copy and share with the sharing unit Director/Head all documents pertaining to annual, third-year, tenure & promotion, and/or post-tenure reviews, including student evaluations.

* Subject to review by the Dean of the College in which the home department resides.

** Unless otherwise defined in the departmental governance document, Joint T&P Committee members are elected from members serving on the Home Department T&P Committee and representatives of the sharing unit.

j. Mechanisms by which applicable revenues are managed if generated by a joint appointee with an externally funded grant.

Any indirects that accrue as a result of an externally funded grant will be shared by the home department and sharing unit on a 50/50 basis (or however agreed upon).

k. Process for modifying or terminating the joint appointment.

Any modification or termination of the joint appointment must be approved by the Chair of the department and sharing unit Director/Head in consultation with the faculty member, and approved by the Dean and the Provost.

Faculty Member

Date

Department Chair (Academic Home Department)

Date

Program Director/Head (Sharing unit)

Date

Dean

Date

Provost

Date

* These guidelines were modified from two sources: The University of Michigan's, and the University of Wisconsin- Milwaukee's policies and procedures for joint faculty appointments.