

**INDIANA UNIVERSITY BLOOMINGTON
and
INDIANA UNIVERSITY PURDUE UNIVERSITY AT INDIANAPOLIS**

**Merger, Reorganization and Elimination of Academic Units and Programs
Involving Core Schools**

(By Action of the University Faculty Council:

Recommendations of the Ad-Hoc MRE Committee – February 23, 2012

University, campus and school administrators, or faculty, may occasionally decide that a reorganization of departments, schools and degree programs is warranted via merger, reorganization, or elimination of academic units (MRE). Such changes may be a response to: new directions in scholarship, science and the arts; new expectations for students entering professional careers or pursuing advanced education; financial constraints; administrative inefficiencies; declining performance or quality. These circumstances may make it prudent to consider and perhaps to implement the merger, reduction, elimination or renaming of academic units and programs, necessitating a reallocation of financial resources and the reassignment of faculty members and librarians to new academic homes.

In the case of single-campus schools, current Faculty Council policies ensure that the faculty of a particular school involved in an MRE are part of the process, but also that a broad cross-campus perspective is represented.*

Some MREs, however, may also involve core schools that have a presence on both the Indianapolis and Bloomington campuses of Indiana University. Each of the core schools has its own organizational structure (in some instances embodied in memoranda of understanding), which varies between schools. In each core school location, full-time tenure track faculty are tenured to the respective campus. Each core school is financially independent. Indiana University also has System Schools and Schools that operate beyond the Core campuses.

* Indiana University Bloomington, Merger, Reorganization and Elimination of Academic Units and Programs (Formerly the Contingency Planning Policy and Procedures for Program Merger & Elimination). (By Action of the Bloomington Faculty Council: December 14, 1982; amended October 16, 1984; amended December 1, 2009; amended April 19, 2011)

In the case of core schools, MRE decisions have the potential to affect that school at each location, and also broadly affect the Indianapolis and Bloomington campuses generally. Therefore, it is important to involve administrators, faculty, students, and constituents broadly on each campus so that all affected units have a chance to provide input and advice should a MRE of a core school be proposed.

Consistent with our commitment to shared faculty and administrative governance, the Indiana University faculty expects that the following principles shall govern such processes of MRE reorganization:

(1) **Consultation.** Faculty and student governance bodies shall be apprised of the need or desirability for reorganizing academic units and programs as early as possible in the MRE process of deliberation, so that their informed input may play a prominent and effective role in planning for change. For core schools, this means both the Bloomington Faculty Council (BFC) and Indianapolis Faculty Council (IFC), with notice to the University Faculty Council (UFC). The BFC, IFC, and UFC shall collaborate with administration to constitute an ad hoc MRE review committee for each such proposal, comprised of faculty proportionate to the faculty populations of each school and campus directly involved, and including appropriate representation from other affected units.

(2) **Faculty Response** Faculty members, librarians and others (e.g., professional staff), on either campus, shall have a reasonable period of time, to be decided in consultation with the UFC Executive Committee and the ad hoc MRE review committee, to provide feedback to the MRE Committee. They shall be invited to send their concerns to the ad hoc MRE review committee or to the Executive Committee of the faculty council on their campus. The ad hoc MRE review committee must be provided with documentation accurately describing the proposed reorganization and the justifications for it. The ad hoc MRE committee shall also receive (1) a financial forecast (including a draft budget [preferably for a three-to-five year period] and an explanation of any reallocation of financial resources] and (2) an assessment of the benefits to teaching, research and service expected to arise from the MRE.

The MRE committee will prepare a report summarizing concerns expressed to it and offering its own comments on the proposed reorganization. The report shall be sent to relevant Deans, Provost(s) / Chancellors and the University President – and considered by – them before any changes are finalized. The report shall also be sent to the executive committee of the UFC and parallel committees of the BFC and IFC.

(3) **Tenure.** Except under conditions of financial exigency (cf. AAUP 1940 Statement of Principles on Academic Freedom and Tenure: “Termination of a continuous appointment because of financial exigency should be demonstrably bona fide.”), the appointments of tenured and probationary tenure-track faculty members and librarians shall not be terminated as a consequence of such MRE reorganization. Necessary reductions in the number of tenured and probationary tenure-track faculty shall be achieved instead by voluntary reassignment or attrition.

(4) **Expectations for Probationary Tenure-Track Faculty.** Faculty members and librarians who are affected by the MRE reorganization of units and programs during the tenure probationary period may choose to be reviewed for tenure under the criteria and standards of the original home unit at the time they were first appointed or under those of their new home unit.

(5) **Reassignment to New Academic Home.** Faculty members and librarians (tenured and probationary tenure-track) whose academic home unit is merged, reduced, eliminated, renamed or in some other fundamental way reorganized may be reassigned to a new academic home based on the mutual fit of scholarly, scientific or artistic interests. Every effort shall be made to find a new home that is agreeable both to the affected faculty member and to faculty members in the receiving unit, with the understanding that in rare instances it may be impossible to find an arrangement that fully satisfies all parties. While their current tenure-home campus has the primary and ultimate responsibility for finding a position for such faculty, reassignment to another IU campus may be a mutually desirable solution, especially in cases where the program as an academic entity continues in existence, although terminated on a specific campus. Faculty members and librarians remain obligated to perform customary research/creative activity, teaching and service responsibilities throughout the period of reorganization.

(6) **Principles governing Reorganization.** The following principles shall be honored in all MRE activities involving Core Schools of Indiana University:

(A) **Compensation and Other Benefits.** Reorganization of academic units and programs shall not result in base pay reductions, in the alteration of negotiated agreements, or in the loss of time accumulated for sabbatical leave eligibility.

(B) **Continuity of Degree Programs.** Every effort shall be made to enable students enrolled in degree programs at the time of reorganization to complete the requirements for those degrees.

(C) **Contracts.** Contractual rights and obligations of faculty and graduate students shall be honored.

(D) **Grievances.** Faculty members and librarians who object to personal consequences of the reorganization of academic units and programs may file a grievance with the Faculty Board of Review at their original tenure-home campus.