

POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Katy Krieger, Interim Director of Faculty Personnel & Policy
Policy Title & # (if applicable):	Policy 02.01.09 Fellowships: Payment of Uncompensated Salary and Other Personnel Expenses (OPE) on Major Fellowships
Submitted on Behalf Of:	Provost
Responsible Executive Officer:	Provost

SELECT ONE: New Policy Revision Repeal

Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: Yes No

If yes, which attorney(s): Jeslyn Everitt

GENERAL SUBJECT MATTER

Include the policy name and number of any existing policies associated with this concept.

Policy 02.01.09 Fellowships: Payment of Uncompensated Salary and Other Personnel Expenses (OPE) on Major Fellowships

<https://policies.uoregon.edu/policy/by/1/0201-personnel/fellowships-payment-uncompensated-salary-and-other-personnel-expenses-ope>

RELATED STATUTES, REGULATIONS, POLICIES, ETC.

List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.

Unit policies will often mention fellowship top-offs (see <https://provost.uoregon.edu/department-unit-policies>). The updated to this policy will support the updated unit policies and the links they provide to faculty to this core policy.

Related policy for graduate students (<https://graduatestudies.uoregon.edu/external-support-doc-funding>) - no updates needed for the faculty fellowship policy but it does support a similar approach in process, which has created institutional alignment and consistency.

STATEMENT OF NEED

What does this concept accomplish and why is it necessary?

Updates are required to clarify this policy including language about use during sabbatical or non-sabbatical periods and the process of distributing funds to faculty during a non-sabbatical period. We've aligned practice of central administrative offices and dean's offices with the policy language to alleviate confusion for faculty and administrators. More information was required in this policy for the terms and conditions of the top-off for fellowships and an example fellowships list was updated.

AFFECTED PARTIES

Who is impacted by this change, and how?

We do not expect any substantial impacts based on the policy revisions. Clearer process information and alignment with current practice both support the revision of this policy and will be beneficial for faculty.

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)

Name	Office	Date
University Senate Voted Yes on this motion	University Senate	2/4/26
OVPRI and designees in schools/colleges	OVPRI	12/1-12/26/25
Directors of Faculty Personnel & Policy; Directors of Academic Operations; Academic Personnel Managers	Schools/Colleges	12/1-12/26/25
Academic CFOs	Schools/Colleges	12/1/25-12/26/25
Associate Deans for Faculty	Schools/Colleges	12/1/25-1/14/26
Provost Exec team	Provost's Office	7/1/25-2/5/26
Dean's Council	Deans	12/1-12/26/25
UO Senate Exec Committee	Senate	1/7/26
University Senate	Senate	1/14/26 and 2/4/26
Jeslyn Everitt	General Counsel	11/20/25
Employee Labor Relations &CHRO	Human Resources	12/1/25-2/5/26

Fellowships: Payment of ~~Uncompensated~~ Salary and Other Personnel Expenses (OPE) ~~on~~to Supplement Major Fellowships

Last Updated

June 30, 1993

Effective Date

June 30, 1993

Reason for Policy

To describe the terms and conditions under which the University ~~will~~may provide salary and OPE ~~not furnished by~~to supplement major faculty fellowships ~~when the faculty member requests such augmentations in a non-sabbatical year.~~ Many prestigious faculty fellowship programs provide only for the direct salary of the faculty member and do not cover fringe benefits: (OPE). In many cases, the fellowships are limited to an amount that covers only a portion of the full faculty salary. These fellowships do, however, permit the faculty member to pursue full-time research during the period of the fellowship, and the University wishes to encourage faculty members to seek and accept these fellowships, especially during potential sabbatical years.

Policy Statement

The University ~~will~~may provide ~~uncompensated~~ salary and OPE ~~on~~to supplement major faculty fellowships during a non-sabbatical year according to the following terms:

1. ~~During a sabbatical year, the fellowship is expected to cover the portion of a faculty member's salary not provided by the University. The University will provide 100% of OPE for the faculty member's designated annual salary. The faculty member is eligible for this support every sabbatical year.~~
2. 1. During a non-sabbatical year, the University ~~will~~may provide up to 30% of the faculty member's designated annual salary to cover the difference between the salary support awarded by the fellowship and the regular salary. The University will provide 100% of the OPE for the designated annual salary: (the salary from the fellowship plus the top-off salary). The faculty member is eligible for this support no more than

once between sabbatical years. With the approval of the appropriate dean and department head, this support may be received immediately before or after a sabbatical leave. A fellowship year may follow a sabbatical, but it does not count as the year owed to the university following a sabbatical.

The University will provide uncompensated salary and OPE according to the terms above when the following conditions are met:

2. The fellowship award amount must be, at minimum, 30% of the recipient's base salary at UO, making the salary top-off from UO akin to a matching grant.

1.3. _____ The faculty member ~~holds~~must hold a ~~tenure-related~~tenured appointment of at least .50 FTE.

2.4. _____ The fellowship award period is for at least a full term during the academic term~~year~~.

3.5. _____ The total salary compensation paid to the faculty member during the period of the fellowship does not exceed the faculty ~~members~~member's usual University salary compensation for that period. This does ~~;~~ not preclude proper additional salary as from consulting, summer salary payments, or special overload payments.

4.6. _____ The fellowship compensation is ~~paid to the faculty member through the University payroll system as salary using an appropriate account to be established for that purpose~~administered by the Office of the Vice President for Research and Innovation and paid via university payroll.

5.7. _____ The fellowship leave is approved by the faculty member's dean and department head.

6.8. _____ The fellowship ~~is one that~~ is intended to support the faculty member's activities appropriately related to research, scholarship, or ~~augmentation of teaching expertise,~~creative activity and it is considered by the Provost to be in the best interests of the University that the faculty member accept the fellowship. Examples of To this end, the fellowship should be a major and prestigious one. Examples of prestigious fellowships that might be eligible include:

- Fulbright~~Scholar~~
- John Simon Guggenheim Memorial Foundation
- ~~Kellogg Foundation~~

National Endowment for the Humanities~~or~~

- National Endowment for the Arts

American Council for Learned Societies

Max Planck Institutes

The Provost may make exceptions to this policy when ~~he believes~~they believe that doing so is in the best interests of the University and the ~~Faculty~~faculty member requesting an exception.

The University's coverage of OPE costs ensures that the faculty member receives continued health insurance and worker's compensation coverage, continues participation in tax-deferred programs~~and the 6% tenure-reduction program~~, and receives credit towards accrued sabbatical time and PERS retirement benefits. The faculty member will also continue to have social security contributions withheld from each paycheck.

Reviewed and Approved By

President's Staff

Date

Wed, 06/30/1993 - 12:00

Issued By

President

Revision History

08 February 2010 - Policy number revised from 3.130 to 02.01.09

Original Source

UO Policy Statement

Reason for Policy

To describe the terms and conditions under which the University may provide salary and OPE to supplement major faculty fellowships in a non-sabbatical year. Many prestigious faculty fellowship programs provide only for the direct salary of the faculty member and do not cover fringe benefits (OPE). In many cases, the fellowships are limited to an amount that covers only a portion of the full faculty salary. These fellowships do, however, permit the faculty member to pursue full-time research during the period of the fellowship, and the University wishes to encourage faculty members to seek and accept these fellowships, especially during potential sabbatical years.

Entities Affected by this Policy

Tenure-track faculty and tenured faculty

Web Site Address for this Policy

<https://policies.uoregon.edu/policy/by/1/0201-personnel/fellowships-payment-uncompensated-salary-and-other-personnel-expenses-ope>

Responsible Office

For questions about this policy, please contact the Office of the Senior Vice President and Provost: (541) 346-3186, provost@uoregon.edu

Enactment & Revision History

February 8, 2010 – Policy number revised from 3.130 to 02.01.09

June 30, 1993 – Reviewed and approved by President's staff

Policy

The University may provide salary and OPE to supplement major faculty fellowships during a non-sabbatical year according to the following terms:

1. During a non-sabbatical year, the University may provide up to 30% of the faculty member's designated annual salary to cover the difference between the salary support awarded by the fellowship and the regular salary. The University will provide 100% of the

OPE for the designated annual salary (the salary from the fellowship plus the top-off salary). The faculty member is eligible for this support no more than once between sabbatical years. With the approval of the appropriate dean and department head, this support may be received immediately before or after a sabbatical leave. A fellowship year may follow a sabbatical, but it does not count as the year owed to the university following a sabbatical.

2. The fellowship award amount must be, at minimum, 30% of the recipient's base salary at UO, making the salary top-off from UO akin to a matching grant.
3. The faculty member must hold a tenured appointment of at least .50 FTE.
4. The fellowship award period is for at least a full term during the academic year.
5. The total salary compensation paid to the faculty member during the period of the fellowship does not exceed the faculty member's usual University salary compensation for that period. This does not preclude proper additional salary as from consulting, summer salary payments, or special overload payments.
6. The fellowship compensation is administered by the Office of the Vice President for Research and Innovation and paid via university payroll.
7. The fellowship leave is approved by the faculty member's dean and department head.
8. The fellowship is intended to support the faculty member's activities appropriately related to research, scholarship, or creative activity and it is considered by the Provost to be in the best interests of the University that the faculty member accept the fellowship. To this end, the fellowship should be a major and prestigious one. Examples of prestigious fellowships that might be eligible include:
 - Fulbright
 - John Simon Guggenheim Memorial Foundation
 - National Endowment for the Humanities
 - National Endowment for the Arts
 - American Council for Learned Societies
 - Max Planck Institutes

The Provost may make exceptions to this policy when they believe that doing so is in the best interests of the University and the faculty member requesting an exception.

The University's coverage of OPE costs ensures that the faculty member receives continued health insurance and worker's compensation coverage, continues participation in tax-deferred programs, and receives credit towards accrued sabbatical time and retirement benefits. The faculty member will also continue to have social security contributions withheld from each paycheck.

N/A