

TO GO or NOT TO GO

Relocating for the Summer - Is It Worth It?

Janice M. Margle

Engineering, Penn State Abington College
Abington, Pennsylvania 19001

Abstract

Shortly after beginning my teaching career, I had the opportunity to spend a summer conducting research at a government lab. It meant packing and relocating for three months. It was an interesting summer followed by a second summer that was equally interesting. I also spent several summers at a government lab where I did not relocate.

It is the question of relocation, and whether it is worth it that is being addressed here. This paper provides a light-hearted, personal look at several issues one might encounter while balancing one's personal and professional life during a summer-relocation.

Each relocation brought with it different issues. The first summer I "went-off"...to do research. I was about to be granted tenure. Recently, when a leading computer manufacturer invited me to spend the summer at their facility, I again packed and relocated. This time the "summer foray" was for the purposes of answering questions such as, "Can I still do it, and do I still have what it takes?"

What I learned and what I experienced is something that new ASEE educators may find helpful. I shall briefly cover issues from salary to taxes to the forwarding of mail. I shall cover professional issues as well as personal. There will also be a sprinkling of humor and listing of suggested resources. This is a paper written for the newcomer by someone who has "been there" and "done that."

Types of Temporary Relocations

During my academic career, I have experienced four separate relocations: one long-term and three short-term. The long-term was a one-year sabbatical followed by a one-year leave of absence. The combination sabbatical/leave of absence, extending over two years, was with the National Aeronautics and Space Administration (NASA) in Cleveland, Ohio. Geographically, the relocation was from Philadelphia to Cleveland.

Of the three short-term relocations, two were also with NASA Glenn. Both were Summer Faculty Fellowship positions sponsored by the American Society for Engineering Education (ASEE), and both required relocating from Philadelphia to Cleveland. More recently, I did a third short-term relocation. This time it was with IBM in Austin, Texas. This relocation took more preparation than other short-term relocations, and from my standpoint, required as much effort as a long-term. (Effort is not necessarily proportional to the number of weeks, or months.)

Living Expenses

Living expenses can range from housing to furniture to food (particularly if there is no kitchen) to electricity, telephones, cell phones, and beepers. Housing alone ranges from corporate housing to do-it-yourself. (Although I have not experienced the use of corporate housing, I understand that companies under certain circumstances offer it to temporary or part-time employees.)

When it comes to housing, things to consider are length of lease, utilities, furnished or unfurnished, amenities (some people want access to swimming pools or exercise equipment), distance from the work place, access to public transportation, and of course, cost.

Length of lease is generally classified as short term (3-6 months) or long term (1 year, or more). Some apartment complexes, especially in high-tech areas, allow conversion from a short-term lease to long-term lease with little difference in overall cost. Utilities such as electricity and heat/hot water may, or may not be included. Telephone service and laundry, generally, are not. At one complex in Austin, Texas, basic telephone service and linens were included along with weekly maid service. One feature to be sure to request is air-conditioning. It can be hot in Cleveland or Austin during the summer.

Furnished apartments are generally the norm. However, the condition of some of the furnished units may be unsuitable or undesirable. An alternative is to rent furniture on a monthly basis. The cost is generally reasonable.

An alternative to an apartment or house is "house-sitting." I "house-sat" both summers while in Cleveland. At one point during the second summer, I had three houses under my purview. I received no compensation from the owners of the houses, but the rewards were equitable. I paid no rent, electricity, or telephone. I rotated from house to house, but "lived" at the house appointed with the best amenities. I also expanded my geographic knowledge of the area by taking different routes when driving from house to house. The downsides were curious neighbors and the care of pets (I ended up with fleas in my hair).

Professional Issues

Being away from a home institution can work in a faculty member's favor offering the potential for collaborative research and possible publications, or it can work against one (missing-out on university politics or changes). More times, than not, the opportunities far outweigh whatever maybe missed at the home institution.

One issue is "first authorship." Ask for the sponsor's policy in writing before beginning any research activities.

While at NASA, I sensed first authorship would be an issue. I requested and received a verbal commitment stating that I, “being the guest researcher” would be the first author on all publications. Needless to say, it did not happen...”out of sight, out of mind.”

Relocation Expenses

For a sabbatical or leave, relocation expenses may, or may not be provided by the host or employer. Relocation expenses generally include transportation (depending upon the distance from the home institution), food, lodging, and some miscellaneous expenses, such as for telephone calls home, turnpike tolls, laundry, etc.

Transportation can be classified as automobile, train, or plane. Some companies provide a fixed amount while others reimburse upon submittal of expenses. Whichever way it is handled, keep a diary and detailed list of expenses with receipts. Make copies of all receipts before submitting for reimbursement. Things get lost even in corporate America and government labs.

Salary

Salary is dependent upon whether the position is based on a sabbatical, a leave of absence, a fellowship, or contract work. For a sabbatical, the salary is generally negotiated between the university and the employer or government lab. For example, if an academic institution provides a faculty member with full salary and benefits for a half-year sabbatical, they will pay half the salary and benefits for a full year. In my case, the sabbatical was for one full year. The government provided two-thirds of my salary (and benefits) and my home institution paid one-third. For the leave of absence, NASA paid both full salary and benefits.

ASEE Summer Faculty Fellowships pay standard rates of \$10,000-\$15,000 for ten weeks of service. Contract salaries vary from annual rates based on twelve-ninths times base salary to whatever the “market” will bear.

Taxes

Taxes issues vary. For example, Pennsylvania has a state income tax; Texas does not. While working in Texas, although no state tax was withheld from my paycheck, upon my return to Pennsylvania and filing of state income tax, taxes had to be paid on income earned in Texas. It also raised the issue of Estimated Income Taxes. The point being...set aside sufficient funds even if the state in which you are working has no state income tax. Your home state may be the final taxing authority. You may have to pay, not only more income tax, but also more Estimated Income Tax.

Other Issues

Mail. Forwarding of US mail can be a problem. Filling out the forms at the US Post Office is not enough. Have a neighbor check your mailbox for you while you are away. Despite the fact that you filed a form requesting your mail be forwarded, some will show up at your

home address. Plus, by the time the postal carrier gets to know your temporary address, it may be time for you to head back home.

Medical. As someone who has multiple allergies, finding a health care provider to administer bi-weekly injections is another issue. Many doctors do not want to assume the responsibility of a patient under another doctor's care. They also do not want to deal with an HMO's from another state.

Pests. "Un-welcome" critters can also be a problem. In Texas, I had to request the exterminator twice within two months. The second time, the odor from the spray was so noxious that I spent the entire evening at the local Barnes and Noble.

Rental Deposit. When renting, or leasing, far from home, there is little incentive to return your rental deposit. Management companies forget about you once you are gone. Try to retrieve your deposit before you leave. It will save you time and money.

Is It Worth It?

The real question is "Is it worth it?" Only you can make that decision. Last spring when I had to choose between a local engineering firm and relocating to Texas to work for IBM, I decided that spending the summer with IBM was more important than money, proximity to home, or the nature of the research project. I trusted my gut feeling, and I came away with one of the best summer experiences of my career.

Write down your goals. Do your homework. List the pluses and minuses. Then, ask yourself, "Will I break-even?" If so, there is no doubt. Go!!

Future Study

A future study on professional and personal issues faced by faculty relocating for the summer is planned. To be addressed are issues such as professional development, including choosing an agency or company that is a good match, publications –not all organizations allow their research to be placed in the public domain (security and proprietary reasons), and continued collaboration during the school year. Friends and colleagues who have participated in the ASEE Summer Faculty Fellowship programs with DOE, NASA, or the Navy will be the initial target.

One of the pluses of academia is to be able to "step outside the box," renew, invigorate, and try new things. It is hoped that, by sharing experiences, new faculty members will be able to more wisely balance their personal and professional lives.

JANICE M. MARGLE

Janice M. Margle is an Associate Professor of Engineering at the Abington College of The Pennsylvania State University. She received both her B.Sc. and M.Sc degrees in Mechanical Engineering from Penn State. At the Abington College, she teaches introductory engineering graphics, thermodynamics, and computer science. She is also active in promoting activities to increase the number of women and minorities in engineering and serves on the Penn State executive committee of the Women In Science and Engineering (WISE) program.