



Merit and PSA Procedures

The following procedural document was formally approved on August 19, 2014 at a meeting of the eligible members of the Unit. These procedures will be reviewed annually.

Procedures for recommending the awarding of Merit:

- Merit determination for faculty members in the professor path is based on an assessment of performance in three areas: scholarly activity, teaching and service.
- Merit determination for faculty members in the professor teaching path is based on an assessment of performance in the areas of teaching, educational leadership, and service.
- Merit may be awarded in units of 1.0, 1.5, 2.0, etc.
- Faculty members may include an indication of the nature and significance of their activities over time for consideration by the Review Committee with regard to PSA.
- Eligible faculty members include full-time continuing academic members of the Unit.
- Faculty members cross-appointed to other Units are reviewed as part of the Unit 2 pool and decisions are made after consultation with the Head of the other Unit.
- Those faculty members with appointments that stipulate reduced teaching or elevated administration (e.g. UFA, CRC) are evaluated accordingly.
- The reporting period for Merit is April 1 to March 31 each year.
- Faculty members are expected to provide an Annual Activity Report, an updated CV, TEQ's for the previous year, and a brief cover letter summarizing significant contributions to the Head or Dean's designate by April 15th.
- Unless a faculty member expressly states that they do not want to be considered for merit, they will be evaluated.
- An *ad hoc* Unit 2 Merit Committee, which is advisory to the Head, will be appointed by the Head annually and shall reflect the composition of the Unit. It will normally consist of at least three eligible faculty members plus the Head and will include at least one member at the Assistant professor or Instructor I rank, and two at the Associate Professor or Senior instructor rank, or full Professor or Professor of Teaching rank
- Each Committee member will independently review faculty activity reports, CVs and teaching evaluation summaries and will rank all faculty members who have indicated that they would like to be considered for merit. The ranking for faculty members in the professor stream will be based on their contributions to scholarly activity, teaching and service. The ranking for faculty members in the professor of teaching stream will be based on their contributions to teaching, educational leadership and service.
- **All deliberations of the committee are confidential.**
- Committee members do not evaluate themselves or any other faculty member with whom they have a personal relationship or a conflict of interest.



- Those on sabbatical or parental leave and those hired by January 1st of the reporting year are eligible to be considered for merit.
- The Committee's role is advisory to the Head or designate appointed by the Dean, who reviews all information and the Committee members' evaluations and makes final decisions on recommendations for merit to the Dean

Evaluation of merit by the Merit Committee should involve the following steps:

1. In the first meeting, the Head should review the relevant portions of the Collective agreement (Appendix A) and explain the unit policy associated with merit evaluation to committee members (Appendix B).
2. Contributions by faculty in the professor path associated with scholarly activity, teaching, and service should be discussed. Committee members will evaluate the annual reports, TEQ scores and CV's by, scoring contributions based on the ratio of workload components designated by the faculty member. The standard workload designation is 40% scholarly activity, 40% teaching, and 20 % service. The allocation to each component will be discussed with the Head, and agreed upon by the head and the faculty member prior to the merit evaluations. If a faculty member chooses to change the ratio, the faculty member will be evaluated on the declared workload.
3. Faculty in the professor of teaching path are evaluated based on teaching, educational leadership and service. The allocation to each component will be discussed with the Head, and agreed upon by the head and the faculty member prior to the merit evaluations.
4. Members of the committee will record the scores on a spreadsheet provided by the Head, and will hand in their scores to the Head after a reasonable time period as determined by members of the ad hoc committee. The Head will prepare a summary score table from each committee member's scores and an overall mean score for each unit member will be determined.
5. A second committee meeting will be held for the discussion of the results. The Head will provide each committee member with a summary score table that excludes the committee member's own scores or the scores of anyone with whom the committee member has a personal relationship. A discussion will be held among the committee members who are then allowed to adjust scores if they feel that there are circumstances that they did not understand or consider.
6. A third committee meeting may be held to present the adjusted summary score table to committee members for discussion before submission to the Dean.
7. It is the Head's responsibility to make the final determination of the rank ordered list for merit that is sent to the Dean, with the justification for each faculty member recommended for merit. This justification should rely on input from the members of the committee.



PSA (Performance Salary Adjustments) are made with regard to overall performance over a period of time and take into account the following factors:

1. Performance in each of the work-load categories over a period of time which is worthy of recognition;
2. The relationship of a faculty member's salary to that of other members taking into account total years of service at UBC and OUC; and
3. Market considerations (Article 2.05, Collective Agreement).
4. Notes:
 - a. Normally, PSA would not be awarded to members in their first three years of employment as a Faculty Member at UBC.
 - b. Members of the Review committee will be consulted on their recommendations for PSA based only on factor 1) as determined by the review of faculty activity reports, CVs and teaching evaluation summaries, and a historical record of previous awards for merit and PSA
 - c. The Committee's role is advisory to the Head, who reviews all information relevant to PSA, and the Committee members' evaluations as per factor i) above, and makes final decisions on recommendations for PSA.
 - d. Faculty salaries are confidential and are not discussed by the committee



Appendix A: Collective Agreement Definitions

Definition of Scholarly Activity:

Judgment of scholarly activity is based mainly on the quality and significance of an individual's contribution.

Evidence of scholarly activity varies among the disciplines. Published work is, where appropriate, the primary evidence. Such evidence as distinguished architectural, artistic or engineering design, distinguished performance in the arts or professional fields, shall be considered in appropriate cases.

1. For the scholarship of teaching, scholarly activity may be evidenced by originality or innovation, demonstrable impact in a particular field or discipline, peer reviews, dissemination in the public domain, or substantial and sustained use by others. For example, textbooks and curriculum reform that changed academic understanding or made a significant contribution to the way in which a discipline or field is taught might constitute useful evidence of the scholarship of teaching whereas textbooks or curriculum revision of a routine nature would not.
2. In professional or clinical studies scholarly activity may be evidenced by research on or the creation of:
 - a. Significant applications of fundamental theory; or
 - b. Significant forms and applications of professional or clinical practice.

Work with professional, technical, scholarly or other organizations or with scholarly publications which falls within the definition of scholarly activity may also be considered.

Definition of Teaching:

Teaching includes all presentation whether through lectures, seminars and tutorials, individual and group discussion, supervision of individual students' work, or other means by which students, whether in degree or non-degree programs sponsored by the University, derive educational benefit. An individual's entire teaching contribution shall be assessed. Evaluation of teaching shall be based on the effectiveness rather than the popularity of the instructor, as indicated by command over subject matter, familiarity with recent developments in the field, preparedness, presentation, accessibility to students and influence on the intellectual and scholarly development of students. The methods of teaching evaluation may vary; they may include student opinion, assessment by colleagues of performance in university lectures, outside references concerning teaching at other institutions, course material and examinations, the calibre of supervised essays and theses, and other relevant considerations. When the opinions of students or of colleagues are sought, this shall be done through formal procedures.



Consideration shall be given to the ability and willingness of the candidate to teach a range of subject matter and at various levels of instruction.

Educational Leadership:

A faculty member in the professor of teaching path is evaluated on demonstrated educational leadership, involvement in curriculum development and innovation, and other teaching and learning initiatives. It is expected that Instructors will keep abreast of current developments in their respective disciplines, and in the field of teaching and learning.

Definition of Service:

This includes service performed for the benefit of Departments, Faculties, Continuing Studies, or other parts of the University (including the Faculty Association), and for professional organizations and the community at large. Such service might include administrative or supervisory work, service on committees and university bodies, all continuing education activity in the community including professional education, special work with professional, technical, scholarly or other organizations or with scholarly publications not falling within the definition of scholarly activity, membership on or service to governmental or public councils and boards, and other forms of academic, professional, and public service.