

# Department of Educational Studies

## Process and Criteria for Recommending Merit and Performance Based Salary Adjustments

Approved in Principle at the Department meeting January 15, 2009 and revised February 2011 Department meeting

Updated in September 2018 to reflect new *Collective Agreement (July 1, 2016 to June 30, 2019)*

The *Collective Agreement Between the University of British Columbia and the Faculty Association of The University of British Columbia, July 1, 2016 to June 30, 2019*, sets out procedures and considerations in **Part 2: Salaries and Economic Benefits**, articles pertaining to Career Progress Increments (CPI), Merit, and Performance Salary Adjustment (PSA) that guide the EDST Merit Committee.

<http://www.hr.ubc.ca/faculty-relations/collective-agreements/salary-agreement/>

Please see the link above for the provisions regarding CPI, Merit, and PSA.

Merit is to be recommended by the Head in consultation with Departmental representatives of all ranks of the Department eligible for merit. The period of review in the Faculty of Education currently is January 1 - December 31.

Recommendations for Merit shall take into consideration the criteria set out in **Part 4: Conditions of Appointment for Faculty** of the *Collective Agreement* for teaching, scholarly activity, and service to the University and community. Details of the process for recommending merit follow.

A *Performance Salary Adjustment (PSA) Award* [Part 2 of the *Collective Agreement*, Article 2.05] is available to address salary differentials beyond those occurring from differential CPI or merit awards. Recommendation for a PSA award is formulated by the Head and is based on three factors: 1) overall performance over a period of time which is worthy of recognition; 2) the relationship of a member's salary to that of other faculty member's taking into consideration the total years of service at UBC; and 3) market considerations.

### Process for Recommending Merit

The Merit Committee in EDST shall consist of the Head plus members to represent each of the ranks of Assistant, Associate and Full Professors as well as Lecturer. These representatives will be selected by the Head and normally serve for two years, on a staggered basis. The Merit Committee normally will meet first to review process and criteria for recommending merit. Committee members will each be provided with a copy of each faculty member's Summary of Activities for the year under review as well as any information about the duties expected of a member in the period in question. Individual Committee members are asked to individually review and assess these documents using the EDST criteria for determining meritorious performance. Using the

EDST criteria as a guide, the Committee will discuss these assessments and make a collective assessment on each faculty member's contribution to each of the three areas (teaching, scholarly activity, and service) as "not meeting", "meeting", or "exceeding" expectations for a faculty member in the Department of Educational Studies. In making these assessments, Committee members will consider the criteria as these apply to each faculty member's **experience, rank, percentage of full-time employment, and duties expected in the period in question**. Where a faculty member holds a joint appointment, the assessment will focus on the duties expected for the portion of appointment allotted to EDST. The Head will formulate recommendations for merit awards based on the Committee's assessments. After the increases are confirmed, the Head will arrange for all individuals receiving merit and PSA awards to be informed of the type of increase they received.

### **Criteria for Recommending Merit**

To qualify for a merit award recommendation, the Summary of Activities will demonstrate that a faculty member has **met** expectations in each of the following categories of scholarly activity, teaching, and service, and has **exceeded** expectations in at least one area.

Criteria and procedures will be reviewed and adjusted on a regular basis to see how well the process helps us make decisions that are both fair and justified as we review our colleagues' work. As we do so, we should also be attentive to how well our criteria complement the criteria for promotion and tenure at the Dean's level and at Senior Appointments, so as to not give false promise to work that will not be valued at other levels of review.

#### **Scholarly Activity**

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

It is expected that all faculty members will work towards completing original scholarly contributions that disseminate their research, and that Associate and Full professors will demonstrate evidence of sustained and productive scholarly activity. Scholarly contributions are research-informed. They can include scholarship communicated through published articles, chapters and conference papers in scholarly or peer-reviewed venues; single or co-authored books in recognized presses; creative, artistic or media-based work particularly in refereed or juried venues; articles informed by research published in professional journals; and published policy reports and curriculum materials informed by research. Editing of a scholarly journal or special issue of a journal is also considered to be scholarly contribution. Research-informed presentations to local, national and international scholarly conferences constitute scholarly contributions.

External funding is important for some forms of scholarship. Recognition is given to scholarly contributions invested in applying for, receiving and managing external grant

funding. Community engagement is also important for some forms of scholarship. Recognition is given to demonstrated knowledge mobilization with/in communities, in contributions that are directly linked to a faculty member's research. Consideration of these activities for merit relates to the scope of the project and the contributing role of the faculty member to the project in the year under review.

While all contributions are recognized, it is acknowledged that scholarly or peer-reviewed publications and presentations to scholarly conferences tend to receive more weight of recognition at UBC. In EDST, it is also recognized that long term projects such as a book may not fit annual quantitative expectations. Scholarly contributions that are published, that is, that are listed in the Summary of Activities with a specific date of publication or presentation, will be considered for merit in the year under review. They will not be considered for merit again after that year. Scholarly activities that are listed as "in press" or "forthcoming" will be considered as evidence of ongoing scholarly activity expected of faculty members.

Additional consideration for merit will be given to quality and relative impact of scholarly contributions. These are signalled at UBC by such indicators as: ranking of scholarly venue; substance, scope and volume of the contribution (such as a book or multi-partnered initiative); national and international impact or status of the contribution (such as keynote addresses, edited collections featuring leading international scholars). It is acknowledged that these indicators may vary in the case of new or interdisciplinary fields. Consideration will be given to any award or public recognition received for scholarly activity in the year under review.

### **Teaching**

It is generally expected that all full-time tenure track and tenured Assistant Professors, Associate Professors and Professors will teach at least twelve credits of coursework annually on the assumption that they are also engaged in a significant amount of service and scholarly activities as well as student supervision. The exception is where course releases have been formally approved through research grants and chairs, special leaves or administrative equivalencies. In EDST, successful teaching is expected.

It is expected that faculty members all participate in graduate thesis supervision in what constitutes an equitable contribution to the Department's numbers of graduate students, considering professorial rank and opportunity. Advisory work with M. Ed. students is also recognized as contribution to teaching. Consideration for merit is given to a faculty member's overall load of graduate supervision responsibility, balance of supervisory contributions to the Department's PhD, EdD, M Ed and MA programs, and the additional effort required by supervising theses completed in the year under review.

Additional consideration for merit is given to other teaching contributions such as new/revised course development; collaborative activity with other faculty members in creating course materials; effectively incorporating learning technologies into course teaching; acting as a Faculty Mentor for teaching assistants; providing sustained mentorship for colleagues; presenting guest lectures to classes; or conducting special seminars/workshops related to teaching or for students. Consideration also is given to any award or public recognition received for UBC teaching activity.

### **Service to the University and Community**

According to the *Collective Agreement* [Article 4.05], at UBC "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". In EDST, service is understood to comprise active participation in events, committees, research centers and processes in ways that are clearly aligned to one's faculty role. Editorial work for journals and other agents is considered service contribution when it is not related to a faculty member's research. Community service activities such as charitable fund-raising for organizations or personal volunteer or advocacy activity will not normally be considered a form of service for UBC unless clear links can be demonstrated to one's faculty role. However, community engagement that is indirectly related to the faculty member's role and research may be demonstrable as service where there is evidence of sustained activity and/or leadership.

Consideration is given to rank. Associate and Full professors are expected to assume relatively greater loads of service, which for Full professors should demonstrate significant participation. In EDST, service is expected to include contributions to a balance of Department, Faculty and University governance activity, depending on rank, as well as to public and/or professional/academic communities.

Consideration for merit will be given to overall load of service, impact of service contributions, and leadership demonstrated in service, particularly where service exceeds expectations of all faculty members, and/or exceeds expectations of a service role that is compensated by course release. Consideration also is given to any award or public recognition received for academic service activity.

### **References**

Collective Agreement between The University of British Columbia and the Faculty Association of The University of British Columbia (July 1, 2012 - June 30, 2019). <http://www.hr.ubc.ca/faculty-relations/collective-agreements/>

UBC Faculty of Education, "Guidelines for Workload Planning." <http://resources-educ.sites.olt.ubc.ca/files/2017/04/Guidelines-for-Workload-Planning-January-28-2015.pdf>