

2023 Faculty Salary Increases

FoM Guide & Merit, PSA and OAP Best Practices
March 10, 2023

Faculty HR Team, Faculty Affairs, Faculty of Medicine



Agenda

- Consultation Process
- Eligibility & Assessment
- Merit / OAP Ranking Considerations
- Resources
- Discussion & Questions



Consultation Process



Policy & Procedures

- Departments and Schools are to have a documented policy and procedure around merit/OAP and PSA assessment.
- Written policy and procedures must be distributed to all members eligible to be considered for merit, OAP and PSA.
- Procedures must address the process for each Joint appointee.
- The Departmental / School's expected academic deliverables are also to be made available.



Consultation Considerations

- The Head shall consult with a reasonable number of colleagues reflecting diverse perspectives and ranks in the unit before making a recommendation regarding merit.

Best Practice: Create a standing Merit / OAP Review Committee that represents diversity in perspectives and ranks, manages any biases, and upholds principles of fairness:

- All ranks represented.
- Have a breadth of knowledge of disciplines and scholarship. i.e., include clinicians vs basic scientists.
- Understand the expectations of faculty in all streams. i.e., Educational Leadership stream vs Professoriate stream vs Lecturers.
- Are mindful of issues related to justice, equity, diversity, and inclusion.
- Representations from the different sites.



Best Practices

- Include junior ranks on the committee to reflect diverse perspectives and ranks, as well as to enable their growth from the experience.
- Establish a procedure for committee membership and turnover. Suggestions:
 - Membership terms with a set term length, or, determine membership annually but require a break between service on the committee.
 - Call-out to eligible members for an expression of interest to serve or via a peer nomination process.
 - In smaller units, include eligible members from other Departments / Schools to remove bias.
 - In larger units, consider having sub-committee for each rank / stream.



Best Practices

- Committee members are to remain impartial and judge each individual case against the criteria based exclusively on the presented evidence (i.e., academic activity report and expected academic deliverables).
- Committee members must declare any conflicts of interest prior to any discussions of a file. The Department Head / School Director shall consider whether that conflict can be managed and decide on the appropriate action to be taken. Where the Chair decides that a conflict of interest cannot be managed, the Committee member must recuse themselves from that review (e.g., spouse or close friends).
- The Merit Review Committee is to have a dedicated meeting to assess and make merit recommendations due to the confidential nature of the annual activity reports.



Joint Department / School Consultation

- According to the Collective Agreement, Merit / PSA for joint appointees will be awarded by the home Department / School, but it is possible for both home and joint Department / School to each award merit from their own pool following consultation.
- In making their recommendation, the home unit shall consult with the joint Department/School(s). It is best practice for each home / joint unit to rank the faculty member in their own separate rank-ordered list to inform the consultation process.

Best Practice: Have an established agreement on the shared cost of merit awards, documented in an internal commitment agreement.



Regional Associate Dean Consultation - Appendix E

- Faculty at Distributed Sites are to be recommended and ranked by the Department / School for merit / OAP following consultation with the RAD.
- The RAD is to be invited by the Department Head / School Director to provide context and an assessment of the faculty member's contributions at the site. This assessment will be provided to the Department / School Merit Review Committee for inclusion in their deliberations.

Best Practice: Utilize Appendix E - Template – RAD Consultation Request Letter within the FoM Guide to Merit, OAP & PSA Recommendations when requesting RAD feedback.



Eligibility & Assessment



Eligibility

Who is eligible for Merit and PSA effective July 1st, 2023?

- Faculty who are members of the Bargaining Unit:
 - Tenure, grant tenure, tenure track, grant tenure track (includes BCCA appointees)
 - Without Review faculty
 - Part-Time faculty
 - Lecturers (full and part-time)
- Must be “active” on June 30th, 2023 and July 1st, 2023.
- Assistant Deans, Centre Directors, Heads / Directors (Dean’s Merit Allocation).

Who is not eligible for merit?

- Faculty who are not members of the Bargaining Unit (i.e., Research Associates, etc.).
- Those in roles that are excluded from the BU (i.e., Associate Deans, Regional Associate Deans, Vice Deans).



What if a faculty member doesn't want to be considered for merit – do we still assess them?

- Within the Annual Academic Activity Report, faculty members may declare their intention to decline the award of merit.
- If they chose to decline merit, they still must need to:
 - Submit a record of their academic activities to their Department Head / School Director annually. This is a requirement of the Collective Agreement.
 - Be assessed by the Merit Review Committee.
- Assessing the faculty member will enable the Department / School to provide them with OAP, if deemed meritorious.

Best Practice: Inquire as to the reason why the faculty member is declining merit, as there may be a misunderstanding.



How are Merit Units Distributed across the FoM?

- Merit is a negotiated salary increase, paid out as a unit value and applied to the base academic salary.
- The Faculty of Medicine receives an allotment of merit units it must award, in accordance with the Collective Agreement.
- The Dean holds back an allotment of merit to award to meritorious senior leaders and Distinguished Achievement Award (DAA) recipients.
- The remaining FoM Merit is allocated to Departments and Schools proportionate to their 'size' (academic salaries and FTE) in the Faculty of Medicine.



PSA

What is the purpose of Performance Salary Adjustments (PSA)?

- To provide contextual salary adjustments to Faculty who are members of the Bargaining Unit (Faculty Association) who have demonstrated meritorious performance.

Possible Considerations:

- Market considerations,
- Years in rank,
- Performance over time,
- EDI,
- Etc.

Scenario: If a faculty member has been continuously meritorious over several years, but the Department/School doesn't have sufficient merit units to award them any merit, their salary will fall being peers of similar years in rank so could be awarded PSA.



OAP

What is the purpose of Outstanding Academic Performance (OAP)?

- OAP is used to recognize those whose academic performance was deemed meritorious but where the person has not received merit units.

Who can to be recommended for OAP?

- Faculty who are members of the Bargaining Unit
- Partner stream faculty

Best Practice:

- Award OAP to those who declined merit.
- Award OAP to faculty appointed under the BCCA Agreement.
- Utilize other forms of recognition in addition to OAP.



Merit / OAP Ranking Considerations



Merit / OAP Ranking Considerations

- The Merit Review Committee is to assess the annual academic activities of each eligible member based upon the Departmental / School's **expected deliverables** and the **context** for their appointment to make their recommendations.

Best Practices:

- Develop and document a methodology to assign a score to each faculty member.
- Utilize sample instructions (Appendix B) and sample scoresheets (Appendix C) within the FoM Guide to Merit, OAP & PSA Recommendations to assess all eligible faculty members within each rank.



Rank-Ordered List Considerations

- Recommend consolidating the scores into a single rank-ordered list.
- The cut-off point within the rank-ordered list identifies those who are deemed 'meritorious' and deserving of merit and/or OAP.
- The process for determining the cut-off point should be documented in Departmental / School policy and procedures.

Best practices:

- Use previous year's merit allocation as a guideline to establish the cut-off and merit recommendations
- Set the meritorious cut-off at around 30%
- Have multiple cut-off points – “must receive”, “should receive” and “not meritorious”



Each faculty member has unique academic contributions. How are we to assess them?

- Assessments shall be based on expected deliverables for each individual within the review period.
- Assessment shall not be based on activities in which the member did not have the opportunity to engage.



How are their diverse activities of the different ranks to be assessed and their scores ranked against others?

- **Scenario:** A Lecturer is assigned teaching and service deliverables. They should only be assessed on their teaching and service, not on any scholarly activity they may choose to engage in.
- **Scenario:** In the realm of service, the expectations of Assistant Professors are typically than Associate and full Professors. Assess Assistant Professors based upon the norms for your Department / School for that rank; avoid comparisons across ranks where possible.

Best Practices:

- Utilize a different scoring system for each rank.
- The Committee may apply a weighting system for each category of assessment to make adjustments for norms, contextual factors, etc.



How are we to consider those who were active for a portion of the year?

- They continue to be eligible for merit while on leave.
- They are to be assessed on the portion of the year for which they were active.
 - **Scenario:** An Assistant Professor, tenure track, is on unpaid leave February 1st through to July 31st.
 - **Scenario:** An Associate Professor with tenure's hire date is May 1st.
 - **Scenario:** A Professor is on study leave January 1 – June 30th.

Best Practice:

- Pro-rate quantity-based expectations; expectations regarding quality remain the same.



How are we to consider those were active for the entire review period, but deliverables were reduced?

- **Scenario:** A faculty member is on a reduced appointment or a retirement option from January 1st to December 31st.
 - **Scenario:** A faculty member is seconded to BC CDC at .2 FTE from January 1st to December 31st.
 - **Scenario:** A faculty member's expected deliverables are different from the Departmental / School norm, due to protected time for research, teaching relief, or a significant administrative role.
- They continue to be eligible for merit in the above scenarios.
 - They are to be assessed on their expected academic activities only, not on those in which they didn't have opportunity to participate.
 - Expectations regarding quantity are to be pro-rated, but expectations regarding quality remain the same.



What do we do with confidential information that might impact merit/OAP assessment?

- Contextual information, such as confidential teaching evaluations or personal extenuating circumstances, etc., regarding the member's academic activities must not be shared with the Merit Review Committee. Instead, this information must be considered by the Head / Director.
- Once the Merit Review Committee has completed their assessments, the Head / Director must evaluate and finalize the rank-ordered list of eligible faculty members.
- It is at the Head / Director's discretion to make adjustments to the rank-ordered list before submission to the Dean's Office.



Resources



FoM Guide to Merit, OAP and PSA Recommendations

- **The FoM Guide has 3 key components:**

- <https://med-fom-mednet.sites.olt.ubc.ca/files/2022/10/FoM-Guide-and-Best-Practices-on-Merit-PSA-and-OAP.pdf>

- **Overview:**

- Merit, Outstanding Academic Performance (OAP), and Performance Salary Adjustments (PSA) - Definitions & Eligibility
 - Annual Activity Reports – Background & Challenges
 - Departmental / School Policies, Procedures, and Review Committee

- **Recommendation Process:**

- Consultation Process
 - Director / Head Recommendations

- **Appendices:** <https://mednet.med.ubc.ca/hr/managing-faculty/workshops/>

- PSA Request Form
 - Templates and Samples



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Discussion & Questions





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