

**BAC Recommendations to FPC related to Merit Policies
2021-2022**

BAC examined each School's merit policy/procedure, with the caveat that HDOSE was rewriting theirs at the time. We also ensured these recommendations did not conflict or contradict the 2021-24 CBA (mostly articles 9.2 and 24.4). Our findings and recommendations include:

1. The policies are quite different, probably due to the diversity of programs across the entire college
2. School merit committees **vary in representation** of both tenure- and non-tenure track. Some people report that they never get the opportunity to serve and see this process from inside. Some report that approved/posted policies are not always followed.
 - a. **OUR RECOMMENDATION: ensure that each School has a process that allows all faculty to be on the merit committee at some point.** Schools might consider a 2-year commitment. In addition, a designated Merit Committee Chair might help ensure that guidelines are followed.
3. **Where are these posted?** Tom reported that some policies are embedded in the School by-laws, and others are maintained by Directors. Tom shared that School bylaws are here: <https://education.ufl.edu/administration/academic-affairs/>, but few BAC members realized they could be found on this site. The fact that these are hard to find is a transparency issue. CBA a few versions ago required By-laws to be posted on College websites. CBA 9.2(b) lists that merit should be an item covered in bylaws.
 - a. **OUR RECOMMENDATION: ensure that these types of documents are available more visibly, with similar process for all Schools. Could be password protected, or not. School by-laws should include merit procedures according to the 2021-24 CBA.**
4. Merit funds are allocated to the School, not to programs. In HDOSE, some programs rank order all faculty which could result in uneven allocation of money by actual merit/productivity.
 - a. **OUR RECOMMENDATION: This might still be a School decision [per Article 24.4 (g) 3 (e)], but it might be helpful to know what other Schools in the College do, and have discussions about options.**
5. Policies also vary related to ensuring that people are **evaluated on their assignments**. Annual reports do not cover many things that are essential parts of our assignments. Addendums can help to document the items that are not visible on the annual reports. Merit committees need to take load/assignments into account. Annual evaluations cover Summer, Fall, & Spring terms.
 - a. **OUR RECOMMENDATION TO FPC: We recommend that each School create an addendum/form for faculty to document activities not listed on the FAR. There should also be a place on the addendum (or separate document) to report faculty assignment/load to provide context for understanding the responsibilities of each faculty member. This could be similar to the effort chart in the T & P packet with a narrative explanation. Per the CBA, faculty must vote on anything created and included in evaluation and merit consideration [Article 9.2(b)].**
 - b. At least one of the schools does not have an "opt out" policy if faculty do not wish to be considered for merit review. Article 18.7(c) in the CBA requires an annual report from each faculty member, but Article 24.4g(3)e allows departmental merit procedures to be used to determine merit raises. Thus, every faculty member is required to submit an annual report for annual evaluation; however, it appears a faculty member could decline to take part in the merit process and decline any raise if the departmental process allows for an opt-out process.

- a. **RECOMMENDATION TO FPC: Schools might consider providing an opt-out process for merit purposes.**

OVERALL RECOMMENDATION TO FPC: There seems to be little guidance in the college constitution regarding Merit policies and procedures. In addition, our Constitution is a bit vague on where the topic of merit policies lies (BAC vs. FAC). Disparities between Schools should be identified and discussed. FAC deals with faculty policies, and since this is budget related, BAC should also discuss with FAC, as we did this year.