



# Okanagan Bulletin

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## Merit & PSA Allocations at UBCO: A 3-Year History

**MICHAEL PIDWIRNY**, FIRST VICE-CHAIR, OKANAGAN FACULTY COMMITTEE

**THE PURPOSE** OF this article is to investigate the question: Were merit and PSA allocated fairly through the UBCO system during the first three years of our existence? We can see a partial answer by analyzing data provided by UBC Administration to UBCFA. Please note that the names of individuals were not on the dataset.

Merit and PSA are components of our salary that are awarded on an annual basis to librarians, tenured faculty, and tenure-track faculty. Both of these funds are for the duties performed in the three components of our work: scholarly activity, teaching, and service. The purpose of the merit award is to recognize outstanding activities that took place in the past academic year. The rationale behind PSA is mainly to award performance over longer time periods and to adjust salaries to match others with similar seniority rank. Article 2 of the Agreement on Salaries and Economic Benefits in the *Collective Agreement* provides more details on how these funds are distributed to members.

The process of distributing merit and PSA funds begins with Advisory Committees at the Unit level. These committees

are composed of tenured and tenure-track faculty who evaluate the annual reports of individuals belonging to their Unit. This assessment is then conveyed to the Unit Head who is often also involved in the evaluation process. The Head then assembles the information and makes recommendations to the Dean, who then makes recommendations to the Provost and Deputy Vice Chancellor.

At UBCO, departments experienced confusion over how this important process should unfold. Further, we had no history of past practice to follow. As a result, Deans frequently tried to steer the process and influence Unit decisions. This resulted in a number of faculty complaints and several grievances. To resolve some of these problems, the Provost and UBCFA set up workshops to train Unit Heads and Deans on how this process should work. Despite this training problems still occurred. Some Deans continued to interpret the nature of the process with a strange set of optics.

The table below shows the outcomes of the UBCO merit and PSA process for the last three years. Two values derived from the dataset are shown: 1) percent faculty successful in

Faculty or Unit	2005/6		2006/7		2007/8	
	Percent Successful	Average Award	Percent Successful	Average Award	Percent Successful	Average Award
Applied Science			83%	\$1,559	79%	\$1,429
Barber School of Arts & Sciences	61%	\$1,633	73%	\$1,405	61%	\$1,737
Creative & Critical Studies	48%	\$1,918	62%	\$1,751	69%	\$1,530
Education	73%	\$1,174	77%	\$1,254	73%	\$1,431
Health and Social Development	47%	\$2,779	64%	\$1,697	67%	\$1,562
Management					71%	\$1,902
Library	40%	\$1,215	40%	\$2,286	40%	\$2,367
All of UBCO	56%	\$1,729	70%	\$1,515	65%	\$1,633

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see ALLOCATIONS

## ALLOCATIONS

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receiving merit, PSA, or both; and 2) average dollar amount of the award. No values are reported for Applied Science and Management for certain years because of the low number of individuals in these faculties.

In the 2005/6 academic-year, the overall UBCO success rate of individuals receiving an award was just 56%. Success rates between faculties ranged from a low of 40% in the Library, to a high of 73% in the Faculty of Education. The average size of these awards showed even more between faculty variation, ranging from \$1,174 in Education to \$2,779 in Health and Social Development. A difference of more than \$1,600!

The overall success rate increased to 70% in 2006/7. This was the year when our leadership changed to Doug Owsram and Alaa Abd-El-Aziz. Both of these administrators worked hard to increase the fairness associated with the allocation of these funds. Despite the increase in faculty success for this year, the average size of the award still remained quite variable between faculties – a difference of more than \$1,000.

In 2007/8, the overall UBCO success rate dropped to 65%. The Dean of the Barber School was primarily responsible for this 5% drop. In that year, he directed his Heads to award the “most” meritorious generously. As a result, 43% of the individuals receiving an award in the Barber School were either awarded more than one unit of merit, PSA worth more than \$1,425, or both merit and PSA. Finally, the variation of the average size of the award in 2007/8 between the faculties dropped slightly from the previous year to about \$940.

Examining the data from the faculty-level perspective

suggests the following interesting insights:

- The Faculties of Education and Applied Science have the highest levels of success and these levels have been quite consistent over the three-year period.
- Levels of success in the Faculties of Creative and Critical Studies and Health and Social Development have increased substantially over the three-year period.
- Lowest success of receiving an award occurred in the Library and this level has been the same for each of the three years.

Amounts of merit and/or PSA awarded have been quite variable from year to year.

So what are my conclusions from this simple analysis? Year One was a complete disaster. A success rate of only 56% is far too low. Success rates did get better in Year Two with the rate climbing to 70%. Personally, I would like to see a success rate of 80%. My goal was definitely not achieved in Year Three! In terms of the size of the average award – there needs to be greater consistency between faculties. Even in year-three there is still far too much variation.

The next step is in your hands. If you believe there should be a higher success rate and less variation in amounts awarded, please echo this message to your Unit Head, Dean, Provost, and even the Deputy Vice Chancellor. **OB**

## Association Executive Election 2009-2010

### CALL FOR NOMINATIONS

The Nominations Committee of the UBC Faculty Association is seeking interested candidates for the following positions (two-year terms):

- Member-at-Large (3 positions)
- Chair, Member Services & Grievance Committee
- Chair, Sessional Faculty Committee
- Chair, Status of Women Committee
- Chair, Okanagan Faculty Committee
- First Vice-Chair, Okanagan Faculty Committee
- Second Vice-Chair, Okanagan Faculty Committee

If you have any questions about these positions, the election or would like to stand for election, please email the Nominations Committee at [faculty@interchange.ubc.ca](mailto:faculty@interchange.ubc.ca), call 604.822.3883 or visit [www.facultyassociation.ubc.ca](http://www.facultyassociation.ubc.ca). Nominations close Wednesday March 4, 2009 at the Spring General Meeting in LIB 101C.

# Budget Promises Broken

**JIM JOHNSON** CHAIR, OKANAGAN FACULTY COMMITTEE

**IN 2004 WHEN** the provincial government, in its wisdom, decided the University should be taken over by UBC, it made certain financial commitments for the five-year period ending in 2009/10 which, of course, is next year. As we await the Government’s budget letter for the fifth and final year of the five-year “roll out,” it might be a good idea to remind ourselves of the promises that were made during the dark days of 2004.

The two main promises were:

1. “The current grant for the 3,000 FTE spaces at the UBC Okanagan campus is approximately \$21 million and an additional \$45 million grant is planned for the additional 4,500 FTE spaces. On the basis of this plan, the total provincial operating funding to UBC Okanagan would be \$66 million by 2009/10. AVED will also provide start-up operating funds to UBC in advance of the arrival of the additional students in order to enable UBC to recruit faculty and to establish the necessary resources for the additional students in time for their arrival.”
2. “AVED will provide \$80 million in capital funding to meet the educational needs of the 7,500 FTE student spaces at the UBC Okanagan campus and this campus will be eligible for BCKDF funds in addition to this amount. UBC will make a significant investment in the campus using its resources including the design and construction of student residences and research space.”

I have no idea how much AVED (the Ministry of Advanced Education) actually provided the in capital funding, nor do I know how “significant” was the investment UBC made in our campus. For all I know, we got every penny we were promised. Certainly there’s a lot of construction going on (although I was under the impression that we are paying for much of it ourselves).

However, the promise to fund us for 7,500 places by 2009/10 has clearly not been kept. According the most recent budget letter, the Government only intends to fund us for 6,552 spaces next year, a loss of a little less than \$10 million.

Year	Spaces Funded (Promise)	Spaces Funded (Actual)
2005/06	3,854	3,637
2006/07	4,766	4,549
2007/08	5,678	5,461
2008/09	6,590	6,020
2009/10	7,500	6,552*
2010/11		6,552*

\*As per the May 30, 2008 budget letter.

If the Government actually provides us with the funding next year that they promised in their budget letter of May 30, 2008, we will be short 948 funded spaces (\$9.48 million) in that year alone (that’s if they don’t cut us again). Again, assuming next year’s actual funding is as per the 2008 budget letter, the total amount of promised funding that was not actually provided, summed over the five-year roll-out period, amounts to over \$21 million.

I know that Doug Ooram has been working hard to convince the Government to restore our funding to the amount originally promised. I certainly wish him luck – he’ll need it. However, until he is successful, I shall continue to regard the 2004 promises as the “\$21 million lie”. **OB**

## MARK YOUR CALENDARS!

WEDNESDAY, MARCH 4 12:30PM LOCATION: LIB 101C  
Spring General Meeting

MONDAY, MARCH 16 - WEDNESDAY, APRIL 1  
Executive Elections ([www.facultyassociation.ubc.ca](http://www.facultyassociation.ubc.ca))

WEDNESDAY, APRIL 1 12:30PM LOCATION: LIB 101C  
Annual General Meeting

# Workload Grievances Settled

JIM JOHNSON CHAIR, OKANAGAN FACULTY COMMITTEE

**IN THE LAST** issue of the *Bulletin*, I reported that the Association had been dealing with a significant number of grievances dealing with the unfair allocation of teaching loads. In particular, we had a number of grievances in the Barber School where individual members of the professoriate had been assigned heavier teaching loads than their departmental colleagues, reducing the time they had available for research and thus making it more difficult for them to compete for merit and PSA awards for promotion. In at least some of these cases, it was evident that the direction to discriminate against the member in question had come directly from the Dean and was intended as a punishment.

On April 8, 2008, the parties settled the specific grievance against the Dean of the Barber School by agreeing that Deans were not to interfere in individual teaching load assignments of members (unless asked to by the members themselves) and that departments were to develop teaching assignment policies that:

- a) specify a standard teaching load for all professors measured in standard three-lecture hour courses (i.e., 2-2 or 3-2, etc),
- b) clearly delineate how nonstandard teaching like labs, graduate student supervision and the like is to be measured in terms of three-credit courses, and
- c) outline the conditions under which faculty would get teaching load reductions (eg. for major administrative duties, for new pre-tenure faculty, or for significant tasks like program development).

At the time that the last *Bulletin* was published, there were still four outstanding grievances in the Barber School arising from the failure of various units to abide by the resolution of that grievance (upon investigation it transpired that the Heads of those Units had not been informed of the grievance

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*It was evident that the direction to discriminate against the member in question had come directly from the Dean & was intended as a punishment.*

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resolution). I am happy to report that all four grievance have now been resolved. The University has agreed that the relevant Units “of the Barber School of Arts and Sciences will be directed to collegially develop teaching assignment guidelines that are consistent with the resolution of the workload grievance of April 8, 2008”. **OB**

## WHOM TO CONTACT

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