November 24, 2003

MEMORANDUM TO: Deans, Directors, Department Heads and Chairpersons, Faculty Members and Director of Libraries and Librarians

SUBJECT: Merit Awards for Bargaining Unit Members

The current collective bargaining agreement (2001-2004) with the MSP provides the establishment of three separate merit pools for bargaining unit faculty and librarians for FY02, FY03 and FY04. Bargaining unit status will be determined by the nature of appointment as of November 21, 2003.

I. Merit Pools

The merit pool is the total monies available for distribution and also details the eligibility for merit consideration. The effective date for all three merit pools is January 1, 2004.

FY02 Merit: Effective 7/1/01, each bargaining unit member on the payroll on 6/30/01 shall be eligible to receive a salary rate increase in the form of a merit award from a 2% merit pool based on the total annual salary rate of all full-time employee equivalents in the bargaining unit and on the payroll as of 6/30/01.

FY03 Merit: Effective 7/7/02, each bargaining unit member on the payroll on 7/6/02 shall be eligible to receive a salary rate increase in the form of a merit award from a 2% merit pool based on the total annual salary rate of all full-time employee equivalents in the bargaining unit and on the payroll as of 7/6/02.

FY04 Merit: Effective 7/6/03, each bargaining unit member on the payroll on 7/5/03 shall be eligible to receive a salary rate increase in the form of a merit award from a 2% merit pool based on the total annual salary rate of all full-time employee equivalents in the bargaining unit and on the payroll as of 7/5/03.

II. Calculation of the Merit Pool

The merit pools shall be distributed to bargaining unit members in accordance with Article XXVI of the 2001-2004 MSP contract, to recognize meritorious performance for Academic Year 1999-2000 (FY02), Academic Year 2000-2001 (FY03) and Academic Year 2001-2002 (FY04). Such awards shall not be distributed as across-the-board increases, nor shall they be limited to a predetermined percentage of bargaining unit members eligible.

(a) One half of each merit pool (Pool A) shall be distributed to bargaining unit members in accordance with Article XXVI or Section 20.3 of the 2001-2004 MSP contract to recognize meritorious performance. Such monies shall be allocated to

departments/programs/libraries on a pro-rata basis of the number of full-time equivalent bargaining unit members in each department/program/library as of 6/30/01, 7/6/02 and 7/5/03 as a percentage of the number of full-time equivalent bargaining unit members in the overall bargaining unit as of the same dates.

(b) The remaining one half of each of the merit pools (Pool B) shall be awarded by the Employer/University Administration to bargaining unit members to recognize meritorious performance, after consultation with the appropriate departments/programs/libraries. Thirty (30) percent of the monies from the pools shall be allocated to departments/programs/libraries on a pro-rata basis of the number of full-time equivalent bargaining unit members in each department/program/library as of 6/30/01, 7/6/02 and 7/5/03 as a percentage of the number of full-time equivalent bargaining unit members in the overall bargaining unit as of those dates. The remaining seventy (70) percent of these pools shall be allocated to appropriate schools, faculties, colleges, libraries or other analogous units on a pro-rata basis of the number of full-time equivalent bargaining unit members in each school, faculty, college, library or other analogous unit as of 6/30/01, 7/6/02 and 7/5/03.

III. Eligibility

All bargaining unit members who meet the eligibility criteria under section one, Merit Pool, except those whose appointments are not being renewed and tenure candidates not being recommended by the chancellor for tenure, shall be eligible for merit awards, including the following:

(a) individuals funded through a grant, contract, or trust fund, provided that sufficient funds are available in the account in accordance with Article 30.2 of the 2001-2004 MSP contract;

(b) individuals on sabbatical leave, provided that the payment shall be proportionate to the bargaining unit member's fraction of appointment during the term of the sabbatical leave and shall be raised to the appropriate rate of increase upon his/her return to regular duties;

(c) individuals on leave without pay, provided that payment shall not commence until regular duties have been resumed;

(d) individuals on replacement loan to other departments/programs/libraries, provided that they shall be counted for allocation purposes in the department/program/library where normally employed to the extent of the fraction of appointment in the department/program/library where normally employed.

IV. Process

For the FY02 merit pool, all recommendations and decisions shall take into consideration the annual report for the academic year 1999-2000; for the FY03 merit pool, all recommendations and decisions shall take into consideration the annual report for academic year 2000-2001 and

for the FY04 merit pool, all recommendations and decisions shall take into consideration the annual report for the academic year 2001-2002. In the case of faculty members, contributions in each of the areas of teaching, research, creative or professional activity; and service must be carefully evaluated. In the case of librarians, contributions shall be carefully evaluated in accordance with Article 20.6.3 of the 2001-2004 MSP contract.

Merit printouts for each of the pools containing a listing of eligible bargaining unit members and information on dollars available in the merit pools will be distributed to department and library personnel committees.

Department and library personnel committees shall first provide to the department head or chair written recommendations for distribution of each Pool A and shall be invited to provide recommendations for the distribution of each Pool B. Department heads and chairs shall forward all evaluations and recommendations to the dean or Director of Libraries (DOL), together with their own comments and recommendations. In addition, any individual wishing to make a recommendation about a faculty member may do so by writing to the relevant dean, or in the case of librarians, to the Director of Libraries. Such recommendations should be submitted within the next two weeks.

After considering these recommendations and completing their own evaluations, the deans and DOL shall provide the Provost with both their own written recommendations and the departmental recommendations for the distribution of all pools. After reviewing all recommendations, the Provost shall determine all awards.

Whenever an academic administrative official's recommended merit increments for the distribution of any merit Pool A differ from the original faculty or librarian recommendation, the departmental or librarian personnel committee involved shall be provided by the academic official with the opportunity to comment on the proposed changes. Any comments shall be forwarded to successive administrative levels, together with the academic administrative official's recommendation.

Before forwarding their recommendations to the Provost, each dean and the Director of Libraries will notify department personnel committees and department heads and chairs of the principles on which his or her recommendations for the distribution of all Pool B's are based and will provide a separate explanation for recommendations from this pool which differ from the original faculty or librarian recommendation and are not explained by the description of principles. Merit awards made from merit Pool B shall not be subject to Article XXV, the grievance procedure.

I hope this information clarifies the merit process. If you have any questions about whether you are eligible for merit consideration, please contact your deans office. If you have any other questions, please contact my office.

Charlena Seymour
Provost