

MEMORANDUM OF UNDERSTANDING (MOA)

PROFESSOR FIVE-YEAR APPRAISAL AWARDS (PFYAA)

The UPI and University agree to a Professor Five-Year Appraisal Awards (PFYAA) pilot program for FY'24-FY'26, in lieu of reinstating the automatic, longevity increases for Professors at +5, +10, +15 years in rank. Specifically, the parties agree to the elimination of the annual merit activities form in favor of a concise portfolio evaluation system that would occur once every five years as part of the Five-Year Appraisal process outlined in Article 20.12 of the collective bargaining agreement (CBA). The criteria for these PFYAA increases will be determined by

individual departments/schools and will be included in their revised Department Criteria (DC) documents. The maximum PFYAA amounts shall be 8% for professors completing their 5th, 10th, and 15th years in rank.

Satisfactory evaluation in the area of Teaching/Primary Duties is required for PFYAA consideration. Professors in

in those disputed cases. The Academic Vice President must notify both the member and UPI Chapter President of the basis for the decision.

- g. Professors applying for PFYAA must meet the promotion (rank of Professor) requirements for Teaching/ Primary Duties to be eligible for a PFYAA. If an otherwise eligible Professor has been assigned, or is in the process of completing a Professional Improvement Plan to address identified weaknesses as established under procedures in Article 20.12.d. or 20.12.e, the Professor is not eligible for a PFYAA. Once the Professor has successfully completed a Professional Improvement Plan, per procedures in 20.12.d., then they are eligible to be awarded a PFYAA if they are otherwise eligible.
- h. In light of the short notice for implementation of the PFYAA system, certain provisions have been implemented in the PFYAA pilot program in order to assist with the transition from the previous Merit Increase system to the new PFYAA program:
 - 1. During FY'24, the Merit Increase evaluation system will remain in effect while the individual academic departments update their Department Criteria to include the specific PFYAA criteria for their disciplines. However, the new percentage increase structure will be in effect (i.e., 3% / 6% / 7%)
 - 2. As a result of the previous item (#1), faculty who are eligible to apply for a Merit Increase in Fall 2023 (those in years 5, 10, or 15 in the rank of professor) will need to complete the Merit Increase form (by September 15, 2023) that was approved by their department as part of the previous (2017-2021) CBA. Additionally, faculty who will be eligible to apply for a Merit Increase/PFYAA next year (2024-2025) may choose to either complete the Merit Form in Fall 2023 and 2024 or they can instead forego completing the Merit Form immediately and instead submit a Five-Year Appraisal portfolio in January 2025 in order to receive the PFYAA for which they are eligible. In other words professors who are eligible next year have a choice of continuing to use the merit

form or switching to the new portfolio based system. All other preferences (i.e. those who are

eligible from 2025-2026 on) will be switching to the portfolio system and will no longer need to complete the Merit Increase form.