

## 1.0 OVERVIEW

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### 1.1 FY2019 Academic Salary Policy

The components of the FY2018-2019 Academic Salary Policy amount to a **2.5%** increase in global base salary mass of eligible academic staff, as follows:

- a. **Across-the-board salary increase (ATB)**  
Effective 1 June 2018, there will be an across-the-board increase of **0.75%** applied to base annual academic salary (excluding stipends and awards) for all eligible academic staff as set out in these Implementation Guidelines.
- b. **Performance-based merit increase (Merit)**  
Effective 1 June 2018, there will be a performance-based merit increase (flat amount) applied to base annual academic salary (excluding stipends and awards) for eligible academic staff, as set out in these Implementation Guidelines.
- c. **Anomaly or retention adjustment**  
Effective 1 June 2018, a retention or anomaly adjustment will be added to the base annual academic salary of eligible academic staff for whom a special request made by the Dean has been approved by the Provost and Vice-Principal (Academic).

All requests for a retention or anomaly adjustment must be related to issues of retention or internal equity.

- d. **Eligibility**  
To be eligible for the across-the-board increase, performance-based merit increase, and retention or anomaly base salary adjustment, the staff member must be employed in an **eligible academic classification**, and must satisfy all of the **eligibility criteria** as detailed in these Implementation Guidelines.
- e. **Confirmation**  
The across-the-board increase, performance-based merit increase, and any approved retention or anomaly adjustment will be applied to the 31 May 2018 base annual academic salary (excluding stipends and awards). Increases are not compounded and are not retroactive.

Salary increases will be effective 1 June 2018, and will be reflected on the pay of 8 June 2018.

Confirmation of individual salary increases will be available to staff directly through Minerva. The electronic confirmation will reflect the across-the-board and merit adjustment, as well as any anomaly or retention adjustment if applicable.

### 1.2 Promotional Increase Envelope

A portion of the academic salary mass has been allocated to cover salary increases for librarians and professors (full-time ranked CAS professors and tenure-track or tenured professors) who are promoted to the rank of associate or full professor/librarian. This increase also applies to full-time faculty lecturers promoted to the rank of senior faculty lecturer or, exceptionally, to the rank of Assistant Professor (CAS), following a due evaluation process. Upon promotion, the staff member will receive a \$5000 increase applied to their base academic salary.

### 1.3 Professional Development Allowance Envelope

A Professional Development Allowance, funded separately by the University and administered by the Office of the Provost and Vice-Principal (Academic)-is also available. Eligible staff members may be able to claim up to \$750 in allowable expenses during the period 1 May 2018 to 30 April 2019. The yearly allowance may be accumulated to a maximum of \$1,500 over the two-year period from 1 May 2018 to 30 April 2020.

Eligibility criteria and conditions regarding the program may be obtained at <http://www.mcgill.ca/apo/academic-staff/other-information/professional-development-fund>.

## 2.0 ELIGIBILITY FOR ACROSS-THE-BOARD AND MERIT INCREASES AND RETENTION OR ANOMALY ADJUSTMENTS

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To be eligible for across-the-board and merit increases and retention or anomaly adjustments, the staff member must be employed in an **eligible academic classification** and must satisfy all of the **eligibility criteria** set out below. As well, they shall satisfy such other conditions detailed in these Implementation Guidelines.

### 2.1 Eligible Academic Classifications

The staff member must have an active employment status at one of the eligible academic classifications:

#### a) Tenure-Track and Tenured Staff:

- Professor
- Associate Professor
- Assistant Professor
- Librarian
- Associate Librarian
- Assistant Librarian

#### b) Ranked CAS and NTT:

- Professor (CAS)
- Associate Professor (CAS)
- Assistant Professor (CAS)
- Librarian (NTT)
- Associate Librarian (NTT)
- Assistant Librarian (NTT)
- Senior Faculty Lecturer (CAS)
- Faculty Lecturer (CAS)

#### c) Unranked CAS:

- Academic Associate
- Senior Academic Associate
- Curator
- Associate Curator

#### d) Historical Classifications: (i.e. classifications no longer in use but held by current staff members)

- Director (Non-stipend)

### 2.2 Ineligible Academic Classifications

The following academic classifications are ineligible to salary policy:

- Assistant Professor (Special Category) – NOTE, however, that an Assistant Professor (TT) who had been an Assistant Professor (Special Category) during the reference period shall be *eligible* provided that their appointment to tenure-track occurred before 1 September 2017.
- All other unranked CAS (e.g. Adjunct Professor, and all visiting appointments)
- All academic staff governed by collective agreement

### 2.3 Eligibility Criteria

In addition, the staff member with an active employment status at one of the **eligible academic classifications** listed above must satisfy all of the following criteria:

- have been hired before 1 September 2017; and
- have an annual base academic salary (excluding stipends and awards) greater than \$0; and
- be supported by funds which have not expired on 1 June 2018; and
- must not have terminated or retired as of 1 June 2018; and
- must not otherwise be excluded or deemed ineligible as set out below.

## 3.0 ACROSS-THE-BOARD INCREASE

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### General Application

Human Resources will apply the across-the-board increase automatically to the base annual academic salary (excluding stipends) for all those who qualify, regardless of funding source.

### University Allocation

For academics who are tenure-track or tenured, the across-the-board increase funded by the University is equal to 0.75% of their total base academic salary (excluding stipends) from both hard and soft funds. For all other eligible academics, the across-the-board increase funded by the University is limited to 0.75% of their base academic salary (excluding stipends) paid from hard funds only.

### Eligibility

Eligible staff members shall meet all of the eligibility criteria cited above.

## 4.0 PERFORMANCE-BASED MERIT INCREASE

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### a) Performance-based Merit Increase Process:

#### **Performance Reference Period**

The period of evaluation for the merit assessment is **1 January 2017 to 31 December 2017**.

#### **Distribution**

The merit increase must be distributed according to the following flat amount categories set out in the Merit Grid appearing below.

A staff member's merit category is intended to reflect the staff member's performance and progress in carrying out his/her academic duties. Merit categories assigned for each reference period are included in the staff member's record with the University.

#### **Communication**

The merit exercise is an opportunity for Chairs, Directors or Deans, to review performance with academic staff. Individual staff members should be given the opportunity to meet with their supervisor to discuss performance over the reference period.

The process for assessing performance must be clear and transparent. These rubrics should be explicit and communicated to staff members. Deans, Chairs and Directors are urged to inform staff members about the weighting assigned to each category of academic duty (teaching, research, service/collegial governance) in their review, the activities or achievements that may be accounted for within each category, and how such activities or achievements are weighted.

#### **Minerva Application**

Each Faculty will access their eligibility list and enter merit categories directly through Minerva. The Minerva application provides Faculties with a reporting tool for each department and individual. At the Faculty level, **no more than 50% of the staff** may be in any one of the categories listed. Faculties are not permitted to exceed their allocated merit envelope.

- **Merit Category**

The same merit category must be used for all sources of funds for the same appointment.

- **Joint Appointments**

Staff with joint appointments may be allocated different merit categories by their departments. The total merit increase for the individual may not exceed the amount for Category 1.

### b) Special Circumstances

While a review of academic performance and the merit category must relate to a faculty member's performance in the given reference period, in some cases, special considerations must be taken into account in weighting a particular category of academic duty or assessing overall performance. Periods of absence are not considered for performance assessment and the performance-based merit increase should be determined on a **pro rata basis** during the reference period, with the exception of maternity and parental leave [see Merit Grid (Category 8), below].

- **Sabbatic Leave**

Performance review should ascribe predominant or full weight to research activity and achievements.

- **Leaves of Absence**

Periods of leaves of absence are not considered for performance assessment and the performance-based merit increase.

- **Maternity, Parental and Extended Parental Leave**

Performance of academic duties is not expected during such leaves, hence the performance should not be assessed during that period. Any productivity or accomplishment that may occur during the leave(s) may be counted in the subsequent reference period. Periods of

leave of 13 or more weeks during the reference will result in the application of a salary increase according to Category 8 (see Merit Grid below).

- **Medical Leave**

Performance of academic duties is not expected during such leaves, hence the performance should not be assessed during that period.

- **Redistributed academic activities**

Where a staff member's academic duties are redistributed, for example, on account of holding an administrative appointment (thus taking on greater service/governance activity) or having been awarded a research chair (thus taking up greater research activity), the staff member's performance assessment and associated merit category should reflect this redistribution.

- **FTE of less than 1 or reduced academic activities**

Where a staff member has an FTE of less than 1 (including staff on phased retirement and tenure-track and tenured staff on reduced load), the performance assessment must account for reductions in academic responsibilities and any merit increase should be prorated in accordance with the FTE.

### Deadlines

Recommendations for performance-based salary increases must be submitted via Minerva for approval **by 13 April 2018 at noon**. Upon receiving confirmation from Human Resources, Deans should inform the staff members of their performance review and merit increase between **18 and 24 April 2018**.

### Appeals

Staff members may appeal their merit increase between the date they are informed **until 7 May 2018**, during which they may make representations to their Dean. If, upon review, the Dean decides to modify the merit category he/she shall do so by notifying Human Resources **no later than 18 May 2018 at 5:00 PM**.

### c) Merit Grid

The reference period for performance assessment is 1 January 2017 to 31 December 2017.

CATEGORIES	AMOUNTS	INSTRUCTIONS
Category 1	\$2,650	
Category 2	\$2,000	
Category 3	\$1350	
Category 4	\$700	
Category 5	\$0	
Category 6	\$0	*Not applicable* For staff members who do not undergo performance review: Assistant Professor (Special Category); new hires on or after September 1, 2017; or otherwise eligible staff on leave of absence without pay or on medical leave during the entire reference period.  Do not use Category 6 for stipend or non-applicable sources of funds.
Category 7	\$700	For new hires (between 1 January 2017 and 31 August 2017). Category 7 is reserved for tenure-track and tenured staff only.
Category 8	TBD	For staff members on leaves associated with the birth or adoption of a child that last 13 weeks or more during the reference period, the salary increase attributed to merit will be calculated based on the average performance category of the last two years of active service. If the academic staff member has less than two years of active service, the assessment will be based on the period of active service. If such leaves endure less than 13 weeks, merit will be based on performance during the reference period.

## 5.0 ANOMALY OR RETENTION ADJUSTMENTS

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### Eligibility

Consideration for an anomaly or a retention salary increase is limited to the eligible staff members holding an active tenure-track or tenured appointment.

### Guidelines

In assessing a staff member for an anomaly or a retention increase, the staff member's current salary should be considered in relation to such parameters as:

- rank and Faculty-specific median salary,
- years of service at the current rank, and
- merit category history during the last 6 performance review exercises.

Anomaly and retention adjustment requests must be ranked by the Dean in order of relative importance and be supported by a written justification. In assessing a request, Chairs and Deans are cautioned to guard against creating inequities within a unit.

### Deadlines

Proposed anomaly or retention adjustments will be submitted for approval directly through Minerva. The deadline for submission of any anomaly or retention adjustment request is **13 April 2018 at noon**. The Provost's decisions will be confirmed with the Deans by **30 April 2018**. If a review is requested, the final decision will be communicated to the Deans by **11 May 2018**.

## 6.0 GENERAL

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### Implementation restrictions due to absences from work

While a staff member may be eligible to the Academic Salary Policy, the application of the base annual academic salary increase or adjustment can only occur if the staff member is actively at work on 1 June 2018 or if the staff member is absent from work on 1 June 2018 because of maternity leave, parental leave, extended parental leave, or salary continuation by McGill while on short-term disability.

### Confirmation

Salary increases are effective **1 June 2018** and will be reflected on the pay of **8 June 2018**.

Confirmation of individual salary increases will be available directly through Minerva. The electronic confirmation will reflect the across-the-board increase, merit increase and any anomaly or retention adjustment.

### Questions

- **Human Resources:**  
Concerning the list of eligible academic staff members and the implementation of these Guidelines, please contact [Daniel Gélinas](#), Total Compensation (Human Resources) at local 2303.
- **Office of the Provost & Vice-Principal (Academic):**  
Concerning performance assessment and merit allocation, and cases for special consideration, please contact the [Associate Provost \(Equity and Academic Policies\)](#) at local 1660.

Concerning general information on retention or anomaly requests, please contact the [Associate Provost \(Academic Priorities and Resource Allocation\)](#) at local 8389.