



JOINT FACULTY AND HEADS TASK FORCE ON SALARY EQUITY AND ANNUAL PERFORMANCE REVIEWS OF FACULTY

**First Report to Provost Folks
May 30, 2020**

This spring, two separate task forces, one comprised of faculty and one of heads were convened by The Office of the Provost by Dr. Andrea Romero, Vice Provost of Faculty Affairs. They were charged with reviewing both Salary Equity Review and the Faculty Annual Performance Review Policy at the University of Arizona. Both these groups met separately several times over spring semester. In addition, the chairs/co-chairs of both groups met to review and share work done by each respective committee. As it turned out, both committees have followed similar paths in the discussions and initial conclusions resulting from those discussions. While we still see much work ahead as the committees continue to work into next year, several early conclusions and recommendations were reached collectively by the two task forces. Thus, we are sharing the following joint report for your consideration and would welcome the opportunity to meet with you to further discuss the findings contained below.

Salary Equity Review and Report

The Salary Equity Review provided a much-needed high-level check and balance to potential inequities that emerge through hiring practices, retention offers and merit pay increases. Those involved in the development of the program are to be commended for successfully implementing the first round of a very complex process. With the benefit of seeing the model play out through its first phase, several observations and recommendations emerged from both committees to improve the efficacy of the program in subsequent rounds.

We understand the necessity for confidentiality in the process. However, the first round of the process left out voices that are critical to making sure both the model itself as well as the decisions made based on the model's output are as effective as possible. We believe there are ways to introduce these voices into the process without compromising confidentiality.

The first of these areas is in the development and maintenance of the model itself. It is clear an immense amount of thought and effort went into developing a nuanced model. In addition, sincere steps were taken to present the inner workings of that model to broad constituents across the university. However, there is still a general sense of mystery around the detailed workings of the model as well as the selection and efficacy of the chosen metrics for evaluation. This has left a question as to whether the model is serving its intended purpose in the most efficient way possible. The chosen productivity metrics in particular have raised significant concern as being relevant to only specific sub-populations of the faculty. We have faculty on campus with deep levels of expertise around both statistical analysis and issues of equity, and it seems advisable to utilize that expertise to provide another point of reference on the model.



Task Force Proposal #1: The Provost's Office should convene a faculty task force (or call on the joint Heads/Faculty task force for this purpose) charged with reviewing and making recommendations around maximizing the efficacy of the current salary equity model. Further, this task force should be given access to a working version of the model populated with simulated data.

The joint task force would be happy to provide recommendations of faculty who could be involved in the task force, though ideally Faculty Senate would be involved in selection as well.

The second area where additional voices are needed in the process is during the conversion of data provided by the model into final decisions around equity adjustments, a process handled almost exclusively by the Provost and Deans' Offices in the first round. While an important tenant of the program is equalizing inherent inequities in decisions made (often in isolation) at the unit level around pay, to exclude the voices of heads altogether from the final interpretation of the model's data deals leaves out information critical to the efficacy of the final decisions.

Task Force Proposal #2: Once data from the pay equity model is finalized, the following steps should be taken in determining equity adjustments:

1. The Provost's Office meets with representatives from the dean's office in order to review model data for faculty in the college and develop an initial set of recommendations around equity adjustments.
2. A report should be distributed to heads listing all faculty in their unit combined with their years in service, years in rank and current salary. This report should also identify those faculty included in the initial equity adjustment recommendation and list the proposed amount of adjustment. Heads should be able to incorporate written feedback into that report for any faculty they wish to provide additional information on.
3. The Provost's Office meets a second time with representatives from the dean's office, and after reviewing the report submitted by each unit head, makes final determinations around equity adjustments.

The joint task forces have a sample spreadsheet model that could be used for the above purposes and are happy to share it on request.

Annual Performance Review

As the Joint Task Forces' charge with respect to Annual Performance Review is much more extensive, we have not yet developed specific recommendation around changes to the program. However, the following questions are being considered as we work towards concrete recommendations regarding the program:

- How can steps be taken to ensure that annual reviews are administered consistently and (to the greatest extent possible) equitably across units at the university?
- Should the reviews be evaluative or formative (or some combination of both)?
- Should the reviews provide scores or only qualitative feedback?
- As workload associated with reviews is of significant concern, should we develop a tiered system whereby faculty at different ranks might undergo more cursory reviews on an

annual basis with “full” reviews happening on a regular but less frequent timeline (we would anticipate still conducting full annual reviews of all pre-tenure faculty).

In addition, as a more urgent concern, both task forces have taken up conversation around whether to develop a recommendation to suspend Annual Performance Reviews for AY21 in light of the level of disruption provided by COVID-19. We anticipate developing a position on that in the coming weeks.

Thank you in advance for your time reviewing and considering the work done by our committees on these important topics. We look forward to continuing these important conversations.

Respectfully Submitted,

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