

### MEMORANDUM OF UNDERSTANDING

The University of Florida Board of Trustees (hereafter, the “Trustees”) and the United Faculty of Florida (hereafter, the “UFF”) hereby agree to the following Memorandum of Understanding on a Faculty Enhancement Opportunity (FEO) pilot program. Unless altered by mutual agreement of the Trustees and the UFF, the pilot program will run in accordance with the provisions of this memorandum from February 2009 through August 2009, except that FEOs accepted for Fall 2009 shall continue through their ending dates.

1. Policy. The Trustees and the UFF agree that FEOs are intended to advance the academic/professional/scholarly abilities of faculty members and to advance the University overall.

(a) New central funds made available for FEOs shall supplement (not replace) funds available for sabbatical or professional development leave programs. A faculty member can receive a centrally funded FEO in the same year as a sabbatical or other professional development leave.

(b) FEOs are intended to be more flexible in nature, duration, and funding than sabbaticals or professional development leaves. Thus

(1) FEO funds shall be expended primarily for salary/benefit offset, travel costs and/or fees for conferences or similar learning experiences. However, FEO funds are generally not intended to fund such things as equipment/supply purchases, pilot studies, or similar items for which other sources of support are available.

(2) Summer salary can be requested for those on 9-month contracts who propose summer FEOs.

(3) FEOs shall not be granted for periods longer than fifteen (15) weeks.

(4) Faculty members from any unit may apply for an FEO in any amount. FEO applications will be considered in relation to categories of funding requested, for example,

- \$20,000 – 40,000 (or less)
- \$41,000 – 100,000
- \$101,000 – 250,000

(c) The intent of the FEO pilot program is to distribute FEOs widely across colleges of the campus over time. However, since applications will be funded based on merit, it is anticipated that not every college or similar unit (hereafter, “college”) will receive a proportionate number of FEO awards each year.

(1) Non-traditional/flexible types of FEO proposals are encouraged in order to maximize the likelihood that faculty members from all colleges can be offered meaningful FEOs.

Approved: Paula Vares Jusseel  
For the University of Florida  
Board of Trustees

Approved: Chris Eudger  
For the United Faculty of Florida

Date: 2/20/2009

Date: February 20, 2009

(2) Each application must be approved by the department chair, the college's Sabbatical/Professional Development Leave Committee, and the dean or equivalent administrator (hereafter, "dean") before being submitted to the central FEO Task Force. These approvals shall constitute an endorsement that the application is meritorious.

(3) The Trustees shall establish a maximum number of FEOs awarded annually to each college, in order to increase the likelihood that over time faculty members in each college can participate in the FEO program. The maximum number of FEOs per college shall be announced before the start of the review and recommendation process.

(d) A central FEO Task Force with broad cross-discipline representation shall review applications endorsed and forwarded from the respective colleges and shall recommend centrally-funded FEOs to the Provost for final approval. The FEO Task Force shall consist of: three faculty members appointed from the Faculty Senate, one faculty member from IFAS and one from the HSC (selected by a process that each Senior VP will determine) and two appointees from the Provost's Office.

(e) Proposals for the FEOs shall clearly identify how the awarded FEO will increase a faculty member's value to the University. Those faculty members receiving FEO funds will be asked to prepare a report regarding the expected results/outcomes following the FEO.

(f) No faculty member shall be discriminated against or retaliated against for taking an FEO.

2. Eligibility.

(a) Any member of the bargaining unit with three (3) or more years of full time service at UF shall be eligible to apply for an FEO. FEO applicants who are on tenure-accruing lines should be advised in writing by their department chair of the tenure clock implications of a part-time or full-time FEO.

(b) Individuals can receive an FEO not more than once every five years.

3. Application Process.

(a) The FEO Task Force shall propose written criteria to use in recommending FEOs for funding. A copy of all criteria shall be attached to the call for FEO applications and shall be posted on the University websites. All such criteria shall also be provided to the UFF/UF President.

(b) The Provost shall issue a call for FEO applications not later than February 26<sup>th</sup> for Summer/Fall awards. (See attached application form.) Faculty members are advised to prepare the FEO application in consultation with their immediate supervisors.

Approved: Paula Vares Jussell  
For the University of Florida  
Board of Trustees

Approved: Chris Indygar  
For the United Faculty of Florida

Date: 2/20/2009

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(c) Applications for FEOs must be submitted on the attached application form. An abridged version of the faculty member’s curriculum vitae, not to exceed two (2) pages in length, shall be attached to the application.

(d) Submission Deadline. The FEO application shall be submitted to the chair or equivalent administrator (hereafter, “chair”) of the faculty member’s department or equivalent unit (hereafter, “department”) not later than March 20<sup>th</sup> for Summer/Fall awards.

4. Selection Process. Approval of proposals at the department and college levels shall constitute an endorsement that the application is meritorious.

(a) Department’s Evaluation. The chair shall evaluate the application in consultation with an appropriate departmental committee. The chair shall notify the applicants of the departmental evaluation and forward all endorsed applications to the college’s elected Sabbatical/Professional Development Leave Committee (hereafter, “S/PDL Committee”).

(b) Evaluation by the S/PDL Committee. All applications endorsed by the department chairs shall be evaluated by the college’s S/PDL Committee, which shall be elected by and from the tenured full-time faculty and whose chairperson shall be elected by the members of the committee.

(1) The committee shall consider the benefits of the proposed FEO to the faculty member, the University, and the profession.

(2) The committee shall submit its ranked list of recommended applications to the dean.

(c) Dean’s Recommendations. After receiving the S/PDL Committee recommendations, the dean or designee shall meet with the Committee, discuss the applications, and agree on which applications to recommend to the central FEO Task Force.

(1) The dean or designee shall forward the endorsed applications to the central FEO Task Force not later than April 17<sup>th</sup> for Summer/Fall awards.

(2) Each college shall forward annually a number of FEO proposals that is not greater than 5% of the college’s total number of faculty members.

(d) FEO Task Force Recommendations.

(1) The FEO Task Force shall review the applications received from and endorsed by the colleges and shall evaluate the five components of the application (goals, plan, benefit to the applicant, benefit to the University, and budget justification).

(2) The Task Force shall recommend to the Provost which applicants should be awarded FEOs. The relevant dean or department chair may be consulted if the Task Force needs additional information about the purpose/value of a proposed FEO.

Approved: Paula Gaines Jussel  
For the University of Florida  
Board of Trustees

Approved: Chris Smolger  
For the United Faculty of Florida

Date: 2/20/2009

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(e) Notification of Awards.

(1) The Provost shall announce the FEO decisions to applicants not later than May 7<sup>th</sup> for Summer/Fall awards.

(2) A faculty member who is awarded an FEO must notify the chair, dean, and Provost within one (1) week after receiving the notification, if the faculty member is not able to accept the FEO.

(3) A faculty member may decline an awarded FEO and reapply in a subsequent year without prejudice. A faculty member may also postpone an awarded FEO, in which case the faculty member does not reapply but simply takes the FEO in a subsequent year approved by the chair and dean provided any funds are made available for the FEO program.

(4) The Trustees shall provide the UFF with a report on FEOs each year not later than May 15<sup>th</sup>. The report shall include the following information for each college in the bargaining unit:

- a. The names of FEO applicants and amounts applied for;
- b. The names of FEO awardees and dollar amounts offered/awarded;
- c. The number of FEOs and dollar amounts accepted;
- d. The number of FEOs and dollar amounts accepted but deferred.
- e. The number of FEOs and dollar amounts declined.

(5) The report shall also include the total number of FEO awards and the total amount awarded University-wide.

5. Additional Conditions.

(a) Copies of successful FEO proposals (without budget information) will be shared with FEO applicants if the proposal author agrees.

(b) Upon completion of an FEO, the faculty member shall submit a report of accomplishments to the central FEO Task Force. The FEO Task Force shall evaluate the faculty member's accomplishment of FEO goals and share this with the faculty member and her/his department chair. This evaluation shall be used in considering any future FEO requests from the faculty member.

6. Violations of the FEO Pilot Program. A faculty member may seek redress of an alleged violation of any term or provision of this Memorandum of Understanding or procedures implemented under this Memorandum by filing a grievance under the provisions of Article 31, Grievance Procedure and Arbitration.

7. Neither the Trustees nor the UFF shall interpret this Memorandum of Understanding as waiving, nor shall it in any way deemed to waive, any rights faculty members have under law and

Approved: Paula Varnes Jusseel  
For the University of Florida  
Board of Trustees

Approved: Chris Snodgrass  
For the United Faculty of Florida

Date: 2/20/2009

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under articles and other MOUs tentatively agreed to and implemented by the parties, except as specifically set forth herein.

8. Neither the Trustees nor the UFF shall interpret this Memorandum as waiving, nor shall it in any way be deemed to waive, any rights either party may have to bargain with respect to wages or other terms and conditions of employment, except as specifically set forth herein.

9. This Memorandum of Understanding will take effect as of the date signed by the representatives of the University of Florida Board of Trustees and the United Faculty of Florida.

Approved: Paula James Jussek  
For the University of Florida  
Board of Trustees

Approved: Chris Snodgrass  
For the United Faculty of Florida

Date: 2/20/2009

Date: February 20, 2009

FACULTY ENHANCEMENT OPPORTUNITY (FEO)  
APPLICATION FORM

Name: \_\_\_\_\_

UF ID: \_\_\_\_\_

Type of Appointment: \_\_\_\_\_ tenured \_\_\_\_\_ tenure-track  
\_\_\_\_\_ clinical \_\_\_\_\_ other (\_\_\_\_\_)

Date of Appointment to UF Faculty (month/year): \_\_\_\_\_

Date Tenure Awarded, if applicable (month/year): \_\_\_\_\_

College or Unit: \_\_\_\_\_

Department: \_\_\_\_\_

Total Central FEO Funds Requested: \_\_\_\_\_

Total College/Department Funds to be Provided: \_\_\_\_\_

Any Other Funds to be Applied, if applicable: \_\_\_\_\_

GRAND TOTAL FOR FEO: \_\_\_\_\_

ABSTRACT: (Provide one paragraph describing your proposed FEO project in a way that can be understood by colleagues outside your discipline, alumni, and educated members of the general public.)

Please submit a two page *curriculum vitae* / resume with your application.

Approved: Paula James Jussel  
For the University of Florida  
Board of Trustees

Approved: Chris Smolyar  
For the United Faculty of Florida

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Goals for FEO:  
(List 3 to 5 succinct goals)

FEO Plan/Activities/Schedules:  
(Describe in 1-2 pages; plan cannot exceed fifteen (15) weeks)

Approved: *Paul Vanes Russell*  
For the University of Florida  
Board of Trustees

Date: 2/20/2009

Approved: *Chris Snodgrass*  
For the United Faculty of Florida

Date: February 20, 2009

Outcomes of FEO: (Remember that you will be asked to submit a report of your accomplishments at the conclusion of the FEO. Please prepare this section with that report in mind.)

A. List specific outcomes of this FEO related to your own professional growth and development.

B. List specific benefits of this FEO to your department, college and/or the university overall.

Check One: I agree ( ) or I do not agree ( ) that my proposal (WITHOUT budget information), if successful, can be shared with others applying for FEOs

Approved: Paula Varnes Jusseel  
For the University of Florida  
Board of Trustees

Approved: Chris Judson  
For the United Faculty of Florida

Date: 2/20/2009

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FEO BUDGET FORM

	Central FEO Funds	Department / College FEO Funds	Other Funds, if applicable (Specify _____)
<u>Salary and Benefits</u>			
Dollar Amt	_____	_____	_____
% FTE	_____	_____	_____
Start / End Dates	_____	_____	_____
<u>Travel Expenses</u>	_____	_____	_____
<u>Fees / Tuition</u>	_____	_____	_____
<u>Equipment</u>	_____	_____	_____
<u>Supplies</u>	_____	_____	_____
<u>Consultants / Outside Contracts</u>	_____	_____	_____
<u>Other (specify)</u>	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<u>TOTAL</u>	_____	_____	_____
GRAND TOTAL			_____

Approved: Paula Varnes Jusseel  
 For the University of Florida  
 Board of Trustees

Approved: Chris Frydman  
 For the United Faculty of Florida

Date: 2/20/2009

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BUDGET JUSTIFICATION:

Briefly explain how requested funds will be used, by category (e.g., salary support, travel)

Approved: Paul V. Juscel  
For the University of Florida  
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Date: 2/20/2009

Approved: Chris Indigross  
For the United Faculty of Florida

Date: February 20, 2009

FEO APPROVAL FORM

1. CHAIR, DEPARTMENT OR COLLEGE SABBATICAL COMMITTEE OR EQUIVALENT:

TYPED NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

2. DEPARTMENT CHAIR:

TYPED NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

3. DEAN:

TYPED NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

Approved: *Paula V. Russell*  
For the University of Florida  
Board of Trustees

Approved: *Chris Fudge*  
For the United Faculty of Florida

Date: 2/20/2009

Date: February 20, 2009