MEMORANDUM

TO: Deans, academic business managers, and co-chairs of joint USFFA-administration FDF committees.
FROM: Jeff Hamrick, Vice Provost for Institutional Budget, Planning, and Analytics
DATE: October 26, 2018
SUBJECT: Modifications to FDF rebalancing procedures.

As part of the recent round of collective bargaining that led to the current version of the USFFA-FT Collective Bargaining Agreement (CBA), the University’s administration and the USFFA-FT bargaining team negotiated a process for annual rebalancing of Faculty Development Funds (FDF) between the academic units. The purpose of this new contractual feature was to disincentivize units from permitting USFFA-FT members from accumulating large FDF balances (in either restricted FOAPs, e.g., at the College of Arts and Sciences, or individual accounts tracked through spreadsheets, e.g., at the School of Management). Another purpose of this new contractual feature was to incentivize the units to make prompt and thorough use of FDF funds, i.e., to increase monitoring and effective within-unit reallocation of FDF funds.

Business managers and other stakeholders involved in administering FDF met after the new USFFA-FT CBA was ratified and created a framework for putting this rebalancing process into effect. The product of these discussions was a memorandum, issued by me, on May 12, 2017. At this time, representatives from the academic units were advised to educate their USFFA-FT members about the change and to pursue appropriate changes to unit-specific FDF policies and practices. To varying extents, they did so.

As the first year of implementation unfolded, concerns were raised by both USFFA-FT members and University administrators about the impact of the rebalancing process on the College of Arts and Sciences. These concerns are summarized in a memorandum written by Hwaji Shin with assistance from Joshua Gamson, and released in April 2018.

In June 2018, University administrators and USFFA-FT met and discussed various modifications to the rebalancing process that might address the concerns raised by stakeholders at the College of Arts and Sciences. Then, I developed this memorandum in conversation with various stakeholders at the University, including selected business managers, the Council of Deans, and representatives from Accounting and Business Services. Several proposals were rejected. One proposal included the formation of a University-wide committee that would consider requests, by faculty members, to immunize their FDF balances from rebalancing calculations on a case-by-case basis. Another rejected proposal involved forming a restricted FOAP for each individual project supported by FDF funds.

Starting in August 2018, I started meeting again with representatives of the USFFA-FT FDF task force. They asked questions and made suggestions that have resulted in changes to this memorandum and the University’s approach to FDF rebalancing.

During September and October 2018, an FDF task force assembled by the USFFA-FT, as well as key groups of administrators (e.g., the Council of Deans, the Office of the Provost, the Office of Planning and Budget, various business managers, etc.) have agreed upon the following modifications to FDF rebalancing practices. The Policy Board endorsed these modifications in an e-vote concluding October 29, 2018.
I. Reaffirmation of existing practices and principles.

A. The University and the USFFA-FT agree to abide by the terms of Article 34 of the USFFA-FT Collective Bargaining Agreement. In particular, both the University and the USFFA-FT stress the importance of the role of the joint USFFA-administration FDF committees and timely submission of receipts, by USFFA-FT members, related to FDF expenditures.

B. The University supports processes for making FDF accessible to all USFFA-FT members at all stages of their careers. The University and the USFFA-FT affirm that the primary purpose of FDF is to support the scholarly and research activities of faculty members and librarians—particularly junior ones—who are developing cases for promotion and/or tenure. As a secondary priority, FDF is meant to enhance the professional effectiveness of our faculty members and librarians—with awards made only on the basis of the academic merits of the associated proposals. Both parties understand that the determination of academic merit, in so much as FDF proposals are concerned, is made by the joint USFFA-administration FDF committees at the academic units.

C. The College of Arts and Sciences, the Gleeson Library and Geschke Center, the School of Education, the School of Management, and the School of Nursing and Health Professions (hereafter: “the academic units”) must maintain rigorous processes by which USFFA-FT members apply to make use of FDF in alignment with above-mentioned priorities. Both parties understand that the rigor of the FDF application process is managed by, and is the responsibility of, the joint USFFA-administration FDF committees at the academic units. All parties further agree that: (i) FDF will not be informally awarded on the basis of a headcount rule, or any substantially equivalent practice; (ii) that joint USFFA-administration FDF committees may consider a member’s past FDF utilization as they evaluate that member’s FDF application; and (iii) that joint USFFA-administration FDF committees may consider the size of proposed FDF awards when determining the extent to which the application can be funded.

D. In order to satisfy Article 34.6 and support the goals referenced in section I, paragraph B, the University and the USFFA-FT agree that the Center for Institutional Planning and Effectiveness (CIPE), the business managers at the academic units, and the joint USFFA-administration FDF committees at each academic unit will make ongoing, collaborative, efforts to improve monitoring of FDF.

II. Changes or standardizations to FDF allocation procedures at the schools or College.

A. Tracking of individual faculty member (or librarian) FDF awards and/or FDF expenditures will no longer be primarily accomplished through the use of Gnosis, Excel spreadsheets, Google documents, or other “shadow” databases that limit visibility into award dynamics or award utilization by the University’s central administration. While Gnosis, Excel spreadsheets, and Google documents may support record-keeping efforts at the academic units, allocation of FDF and related expenditures will be reflected in Banner Finance as indicated in this memorandum.

B. The academic units will establish two restricted FOAPs for each faculty member or librarian. Per a protocol to be identified by the CIPE and the Office of Accounting and Business Services (ABS), one FOAP will be indexed (or labeled, or marked) in a way that indicates an association with odd-numbered years. Another FOAP will be indexed or marked in such a way to indicate an association with even-numbered years.
Note: By “odd-numbered year,” we mean one of the following: a fiscal year ending in an odd number or an academic year (e.g., 2018-2019) whose spring semester (i.e., spring 2019) corresponds to an odd-numbered year. A similar definition holds for even-numbered years.

Note: To make the FOAP structure as intuitive as possible, CIPE will work in good faith with ABS to see that the fund numbers and names, i.e., whether those numbers are odd or even, correspond in some way to the indexing as well.

C. The joint USFFA-administration FDF committees at the academic units will establish and/or sustain any number of opportunities to apply for FDF between August 1 and May 1 of each fiscal year. Joint USFFA-administration committees at each academic unit determine the frequency and timelines for their FDF application processes for their respective units. The joint USFFA-administration FDF committees must complete their review of any outstanding FDF applications by May 15 of each fiscal year. Funds in individual faculty FDF FOAPs may be used over the summer months.

D. The University and the USFFA recognize that sometimes, a joint USFFA-administration FDF committee may have good cause to consider an FDF application, and to make an FDF award, outside of the period of time from August 1 through May 1. Joint USFFA-administration FDF committees at each academic unit determine whether they will consider requests outside the August 1 to May 1 window. If a committee decides to create policy to consider exceptional requests, one such good cause would be when an unforeseeable and urgent research or scholarly opportunity presents itself to a USFFA-FT member after May 1, but before the committee begins accepting FDF applications in the fall. Another such good cause would be when a USFFA-FT member determines that, due to unforeseeable circumstances outside their control, a realized expense for a previously funded project will be greater than stated in the original application.

(i) In both cases, it is preferred for the USFFA-FT member to try to delay the research or scholarly activity and then make an application for FDF after the fall semester begins.

(ii) If the research or scholarly activity cannot be delayed, it is preferred that the USFFA-FT member pay for the expenses associated with the activity out of pocket and then submit a retroactive FDF application after the fall semester begins. Such applications for retroactively-awarded FDF will be governed by policies and practices established by the joint USFFA-administration FDF committee at each academic unit. Funding for applications for retroactive awards is not guaranteed.

(iii) If the research or scholarly activity cannot be delayed, and a USFFA-FT member cannot pay for the expenses associated with the activity out of pocket, then the USFFA-FT member may submit an asynchronous (i.e., off-cycle) application for FDF. Such applications will be governed by policies and practices established by the joint USFFA-administration FDF committee at each academic unit. Funding for asynchronous applications is not guaranteed. Because these award funds would be transferred after the fiscal year cycle ends, the funds will go in a FOAP that will be swept in September of that calendar year. Consequently, awards made during the summer must be spent by August 15 of the same year.

E. When, after the launch of the new fiscal year, CIPE makes allocations of FDF from the centrally-budgeted Provost’s pass-through FDF pool, those allocations will be made to a single restricted FOAP (hereafter: “the unit pool FOAP”) at each academic unit.
F. Business managers at each academic unit support the joint USFFA-administration FDF committees by transferring awarded funds from the unit pool FOAP to individual faculty FOAPs. FDF awarded during odd-numbered fiscal years will be transferred from the unit pool FOAP to the odd-indexed FOAP associated with the individual USFFA-FT member. FDF awarded during even-numbered fiscal years will be transferred from the unit pool FOAP to the even-indexed FOAP associated with the individual USFFA-FT member. See section III for a summary outline.

G. Unused FDF awarded during an odd-numbered fiscal year will be subject to the rebalancing operation on, or around, September 1 of the next odd-numbered fiscal year. Similarly, unused FDF awarded during an even-numbered fiscal year will be subject to the rebalancing operation on, or around, September 1 of the next even-numbered fiscal year. Available balances in unit pool FOAPs will not be subjected to the rebalancing operation. Again, see section III for a summary outline.

H. Deans or their designees— including, but not limited to administrative co-chairs — will work with the joint USFFA-administration FDF committees to monitor the use of FDF. Similarly, USFFA-FT members are expected to identify and to report their own FDF that cannot or will not be used for originally approved purposes. Such FDF may be transferred back to the unit pool FOAP in accordance with policies established by the academic unit’s joint USFFA-administration FDF committee. Any such transfer must be executed before September 1 of the fiscal year following the fiscal year in which the award was made. It may then be allocated by the joint USFFA-administration FDF committee as part of a subsequent award cycle.

I. After September 1 of the fiscal year after it was originally awarded, FDF in individual faculty FOAPs can no longer be transferred back into the unit pool FOAP. Such FDF will either be (a) used by the USFFA-FT member for its originally approved purpose or (b) shall remain in the USFFA-FT member’s restricted FOAP until the next rebalancing operation.

J. On, or around, September 1 of the subsequent odd-numbered year, unused FDF in all odd-indexed individual USFFA-FT member FOAPs will be subjected to the rebalancing operation. See section III. In this way, with the exception of asynchronous requests (see section II, paragraph D, part iii), all unused FDF awards will effectively expire after 15-20 months (depending on when the initial award was made).

K. Similarly, on, or around, September 1 of the subsequent even-numbered year, unused FDF in all even-indexed individual USFFA-FT member FOAPs will be subjected to the rebalancing operation.

L. If a USFFA-FT member encounters obstacles related to approved maternity, family, and medical leave that prevent timely use of awarded FDF before the rebalancing operation, they are eligible to request replacement funds within six months of their return to work. Upon submitting the request to their academic unit’s joint USFFA-administration FDF committee to cover activities remaining from the original application, the committee will automatically approve the request. The co-chairs will then notify CIPE/OPB. CIPE/OPB will transfer replacement funds to the individual faculty FOAP. These funds will come from the next fiscal year’s University-wide FDF budget.

M. Exception: In the event that a USFFA-FT member dies, is terminated, or resigns, available balances (in both the odd- and even-indexed FOAPs associated to that USFFA-FT member) will be transferred immediately to the pool FOAP at the academic unit. The business manager at that
academic unit is responsible for inactivating the FOAP associated to that University employee when that employee dies or otherwise ceases to be employed by the University.

N. **Exception:** In the event that a USFFA-FT moves into an administrative position at the University, available balances (in both the odd- and even-indexed FOAPs associated to that USFFA-FT member) will be transferred to the pool FOAP at the academic unit as of that employee’s effective start date in the administrative position. The business manager at that academic unit is responsible for working with ABS to inactivate the FOAPs associated to that administrator if they leave the University before returning to the faculty.

O. All school- or College-level FDF policies, practices, or procedures in contravention to any language in any section of this document are no longer in force or in effect. In particular, neither deans (nor designees of deans) nor joint USFFA-administration FDF committees may shield unused FDF balances from rebalancing.

### III. Summary: An outline of new allocation and rebalancing operations.

A. On, or around, September 1 of each fiscal year, CIPE/OPB will execute the **rebalancing operation**.

**Note:** CIPE/OPB cannot guarantee that this step will be completed on September 1 because September 1 may be on a weekend or holiday. Furthermore, certain USF employees must be present and available (i.e., not on vacation) in order for this step to be executed—hence, the “on or around” proviso. The rebalancing, while possibly executed between September 1 and September 15, will be based on Banner Finance available balances effective September 1.

(i). **If the current fiscal year is odd-numbered:** CIPE/OPB will execute a journal entry to sweep up the available balance (i.e., unused FDF) from each odd-indexed individual USFFA-FT member FOAP. The sweep-up will not include the available balance in the unit pool FOAP. Then, CIPE/OPB will proportionately reallocate the sum of the funds in the odd-indexed FOAPs to the unit pool FOAPs on the basis of paid FTE assignments as of the first payroll cycle of the then-current academic year. Also, as of September 1, deans (or their designees) may no longer transfer FDF back from even-indexed individual USFFA-FT members’ FOAPs to the unit pool FOAPs. After new awards are made into odd-indexed FOAPs, deans (or their designees) may, in conversation with the joint USFFA-administration FDF committee co-chairs, transfer FDF back to the unit pool FOAP – but only prior to September 1 of the subsequent fiscal year.

(ii). **If the current fiscal year is even-numbered:** CIPE/OPB will execute a journal entry to sweep up the available balance (i.e., unused FDF) from each even-indexed individual USFFA-FT member FOAP. The sweep-up will not include the available balance in the unit pool FOAP. Then, CIPE/OPB will proportionately reallocate the sum of the funds in the even-indexed FOAPs to the unit pool FOAPs on the basis of FTE paid assignments as of the first payroll cycle of the then-current academic year. Also, as of September 1, deans (or their designees) may no longer transfer FDF back from odd-indexed individual USFFA-FT members’ FOAPs to the unit pool FOAPs. After new awards are made into even-indexed FOAPs, deans (or their designees) may, in conversation with the joint USFFA-administration FDF committee co-chairs, transfer FDF back to the unit pool FOAP – but only prior to September 1 of the subsequent fiscal year.
B. After the rebalancing operation, CIPE/OPB will allocate new FDF to each unit pool FOAP. This step is called the new allocation operation. This new allocation is subject to the provisions of the USFFA-FT Collective Bargaining Agreement (e.g., see article 34). In particular, the new allocation will be made on the basis of paid FTE assignments as of the first payroll of the then-current academic year.

C. At any point after August 1, the joint USFFA-administration FDF committees may open up their FDF application processes and make awards per established policies and practices at the academic units. Awards made during that fiscal year will only be placed in the individual USFFA-FT member FOAPs indexed in correspondence to the associated fiscal year.

Example: If Susan P. Faculty secures an FDF award of $4,500 during academic year 2017-2018 (i.e., FY18), that $4,500 will be placed into the Susan P. Faculty II restricted FOAP.

D. After the new allocation and rebalancing operations are complete each fall semester, CIPE/OPB will make a report on these activities to the President of the USFFA-FT and the University’s Provost and Vice President for Academic Affairs.

IV. Practical Issues Related to Jump-Starting Implementation in Fiscal Year 2018-2019

A. The rebalancing of FDF originally scheduled for September 1, 2018, and mentioned in article 34, will be set aside.

B. At the academic units, the business managers will have until November 10, 2018 to (a) identify or create a unit pool FOAP and (b) create both odd- and even-indexed individual USFFA-FT member FOAPs. These FOAPs will be named according to a protocol identified by CIPE and ABS, as mentioned in section II, paragraph B.

C. By November 20, 2018, the available FDF balance (as of November 10, 2018) associated with each USFFA-FT member will be transferred from the unit pool FOAP (or other FOAPs) to the newly-created individual USFFA-FT member FOAP. These transfers will be identified as effective for the prior fiscal year, i.e., FY18, i.e., the transfers will be made into the even-indexed FOAPs.

D. Funds placed in even-indexed FOAPs in accordance with section IV, paragraph C are not eligible for transfer back into the unit pool FOAP. Faculty members must spend these funds for their originally-approved purposes by August 15, 2019. See section VI, paragraph D. Unspent funds in these even-indexed will be subjected to the first rebalancing operation on, or around, September 1, 2019. See section IV, paragraph F.

E. The new allocation operation for FY19 will be delayed until November 30, 2018. The joint USFFA-administration FDF committees may proceed with their usual fall FDF application and awarding processes, however. Awards stemming from this process will be made into the odd-indexed individual USFFA-FT member FOAPs since this process is getting underway in FY19.

F. The rebalancing operation from section III will not take place until FY20. In FY20 (i.e., on or around September 1, 2019), the even-indexed individual USFFA-FT member FOAPs will be the first collection of FOAPs subjected to rebalancing.
G. The business managers at each academic unit will work with ABS to make available balance and transaction activity (reported through Self-Service Banner) for individual USFFA-FT member restricted FOAPs accessible to the associated USFFA-FT members.

H. The business managers at each academic unit will train individual USFFA-FT members on how to access their available balances and view transactions in the FOAPs associated to these USFFA-FT members. This training will be completed by February 15, 2019. Business managers are welcome to take cues from documentation produced recently by Sharon Li at the College of Arts and Sciences.

I. Over the next few years, CIPE will work with the co-chairs of the joint USFFA-administration FDF committees to develop reporting tools (e.g., in Tableau) that aid in monitoring the use of FDF and shed light on the implications of the new rebalancing scheme described in this memorandum. The first version of these reports will be available within twelve weeks of this memo’s implementation.

V. Examples

A. It is fall 2019. S.H., a faculty member in the Department of Biology, applies for $4500 for airfare, hotel, and registration for a conference in Dallas in spring 2020. S.H. also applies for $1000 for some biological samples for a research project unrelated to the aforementioned conference. The proposals are fully funded. S.H. attends the conference, spending only $4200, and notified the CAS business manager of this fact. While S.H. intended to launch the project requiring use of the biological samples in FY20, S.H. was unable to do so.

**Consequence:** The FDF for these two projects was placed into an even-indexed FOAP that is not subject to rebalancing until fall 2021, i.e., FY22. The $1000 available balance in S.H.’s even-indexed FDF FOAP (as of, or around, May 2020), will roll into FY21 and S.H. can spend it during FY21 on the project requiring the use of the biological samples.

**Consequence:** Having been properly notified that the cost of S.H.’s participation in the Dallas conference was $300 less than budget, the CAS business manager coordinates with the co-chairs of the CAS joint USFFA-administration FDF committee. They agree that the $300 should be transferred back into the CAS pool FOAP. Because the $300 was originally awarded in FY20, and because it is not yet September 1, 2020, the CAS business manager may do so.

**Twist:** If S.H. neglected to apprise his business manager that his conference spending was under budget, or his business manager forgot to coordinate a transfer back to the CAS pool FOAP, then after September 1, 2020, that balance must remain in S.H.’s even-indexed FOAP until the rebalancing operation on (or around) September 1, 2021. It cannot be spent for activities other than the originally-approved activity, and past September 1, 2020, it cannot be transferred back into the CAS pool FOAP.

B. It is fall 2020. N.P. applies for $8000 in FDF. N.P.’s proposals are fully funded and budget is loaded into an odd-indexed FOAP (since fall 2020 corresponds to FY21). By the end of spring 2021, N.P. has spent all but $2000 in connection with projects approved for FDF in the original proposal. In summer 2021, N.P. is offered a one-year fellowship at a center at a very prestigious university in Montreal. N.P. takes an unpaid leave of absence. The center N.P. is working at in academic year 2021-2022 covers some of N.P.’s research expenses, and N.P. never gets around to spending that last $2000 on approved projects. Arriving back from the leave of absence in fall 2022, N.P. asks if she can have another year to spend that $2000.
Consequence: Neither N.P.’s dean nor the co-chairs of the joint USFFA-administration FDF committee at her school or College can “extend the life” of that $2000. It did not get spent by September 1 of the next odd-indexed fiscal year, i.e., FY23. It will be swept up and rebalanced between the schools and College. N.P. retains the option of applying for FDF from her school/College in fall 2022 and can include information (e.g., “…a substantially similar proposal was approved and funded in fall 2020, but…”) for the consideration of the joint USFFA-administration FDF committee.

Twist: N.P. uses her fall 2020 award to conduct a research project through spring 2022. Then, unfortunate circumstances force N.P. to go on medical leave. N.P. is unable to finish the project before the September 2022 rebalancing operation. Within six months of N.P.’s return to work, N.P. can request replacement funds from the academic unit’s FDF committee to complete the same project. That request will be approved and funded consistent with Section II, paragraph L.

C. M.M. applied for, and received, $6000 in FDF from the School of Management in fall 2019, i.e., FY20. It was placed into the even-indexed FOAP associated to M.M.’s name. Most of the FDF was approved for M.M. to attend a business analytics conference in Dubai in summer 2020. However, political unrest in spring 2020 caused that conference to be cancelled and rescheduled for summer 2021.

Consequence: M.M. should check in with the co-chairs of M.M.’s joint USFFA-administration FDF committee. If joint USFFA-administration FDF committee policies at the academic unit allow it, and since summer 2021 is prior to September 1, 2021, M.M. can attend the rescheduled conference the following summer. M.M. should return receipts related to his originally-approved (but now forcibly modified) expenditure plan promptly by August 15, 2021.

Twist: Suppose that instead of rescheduling the conference, its organizers had cancelled it. Taking the initiative, M.M. finds another similar conference in Mumbai. M.M. plans on waiting for the FDF in his FOAP to carry forward into FY22 and to then spend the FDF to go to this new conference in Mumbai. This action is not permitted. The conferences are not the same. M.M. should notify his unit’s business manager prior to September 1, 2020. The business manager can transfer M.M.’s FDF back to the unit pool prior to this date, and M.M. can file a subsequent application for FDF for the new conference. In his application to his school’s FDF committee, M.M. can explain the circumstances surrounding his proposal.

VI. Miscellany

A. Under current University policies, faculty members who are the recipients of external grants may be eligible to benefit from partial return of indirect (e.g., overhead) expenses. The funds associated with such partial returns of indirects may not be placed into a faculty member’s FDF FOAP. In general, non-FDF funds may not be commingled with FDF.

B. Fund hierarchies at the academic units must be organized in such a way that non-FDF research-related FOAPs are not located at the same level as individual faculty members’ FDF FOAPs.

C. Prior to execution of the rebalancing operation, negative balances in each individual faculty FDF FOAP must be cleared by that faculty member’s academic dean. Deans must use discretionary non-operating gift funds in order to clear these negative balances. Negative balances cannot be cleared by application of funds from the unit pool FOAP, funds from individual faculty
members’ FOA

Ps that have positive balances, operating funds from the academic unit, or other
restricted funds (e.g., endowment spending accounts, current use funds, etc.) that are not
permissibly used to clear such negative balances.

D. The Office of Accounting and Business Services will commit to clearing all FDF-related
expenditures submitted through Concur by each August 15 prior to the rebalancing operation on,
or around, September 1 of each year. For this throughput to be fast and effective, faculty
members must turn in their receipts—typically for FDF-related expenses generated during the
prior summer—by August 15. Then, the business managers in each academic unit (as well as
Concur approvers such as business managers, associate deans, deans, and the Office of Planning
and Budget) must review and process the associated expense reports quickly.

E. All parties agree that FDF is available only to cover expenditures that are (a) approved by the
joint USFFA-administration FDF committees for (b) USFFA-FT members on paid assignments.
That is to say, USFFA-FT members on unpaid leaves of absence (for any reason) may not cover
research-related expenditures (even if approved as part of an FDF proposal by a joint USFFA-
administration FDF committee) incurred during periods of time in which that USFFA-FT member
was not on paid assignment. USFFA members on unpaid leave, typically associated with the
Family and Medical Leave Act, already negotiate the terms of their leave with their dean. Funds
for scholarly activity and professional effectiveness can be a part of those discussions.

F. FDF will not be used for the purchase of capital equipment, here defined as physical or
software assets that are long-lasting, durable, require renovation or reconfiguration of space in
order to be deployed, and cost more than $7,500. USFFA-FT members who need to purchase
capital equipment to advance their scholarly plans should contact their deans, who will work with
CIPE/OPB to review, to approve, and to cover these types of expenses. Expenses for all other
goods or services (e.g., specimens, outside vendor services, research assistant pay, etc.) will
continue to be eligible for FDF.

G. Activities described in approved FDF awards must be achievable in the time frame for which
awarded funds are available (i.e., before the sweep up and rebalancing of the individual USFFA-
FT member FOAPs for the year).

H. All parties agree that, in light of this memorandum, Article 34.12 is set aside. In other words,
the provisions of this memorandum supersede Article 34.12.

I. All parties agree that, in light of this memorandum, the memorandum issued by the Vice
Provost for Institutional Budget, Planning, and Analytics on May 12, 2017, is set aside.

J. Both the administration and USFFA-FT understand that these new FDF allocation and
rebalancing practices may lead to unintended consequences. Some of these consequences may not
be apparent until one or more two-year cycles have passed. Both the administration and the
USFFA-FT agree to work in good faith and to meet periodically (i.e., at the request of either
party) to discuss and to clarify this memorandum, or to address unintended consequences as they
emerge and are identified.

K. The University and the USFFA-FT agree to the following change to Article 34.8 of the
USFFA-FT Collective Bargaining Agreement. This change will be properly memorialized during
the next round of collective bargaining:
An Association member shall submit any dispute concerning this Article in writing to the President of the Association or designee and the Provost or designee for final resolution within twenty working days of the time the dispute arose. If the dispute is not submitted in writing and within ten (10) twenty (20) working days, the University or the Association shall have no obligation to respond, and the decision of the committee shall be final.