**Option #2**

**Faculty Handbook Committee Timeline Subcommittee Proposal—March 2024; updated September 2024;**

Executive Summary:

In a 2023 document, the Council of Academic Heads (CADH) requested a review of the faculty evaluation timeline:

***The CADH called for the following changes to the evaluation process:***

1. *Department heads will only conduct one evaluation per year for probationary faculty.* Probationary faculty members’ Feb. 1 letter will serve as the basis for their merit pay decision. In the event that proposal #2 below is not enacted, heads could still have the *option* to relay additional documentation of merit pay decisions to probationary faculty members if the assessment differed from the probationary letter. This could vary from a short update to a full letter, based on the head’s discretion.
2. *The university will shift the merit evaluation timeline* to allow heads to complete letters in enough time to load merit pay decisions into the HR system. Options include:
3. *Shift merit evaluation and faculty reporting to the calendar year.* Heads could have goal-setting meetings with faculty in November, December, and January (rather than compressed into the first couple weeks of the school year). Heads would still submit probationary letters by February 1 but could have until, say, April 1 to complete tenured faculty members’ evaluation letters.
4. There was some preference expressed among heads for this option, though several noted that it could be difficult for those with large departments to complete letters while they’re also teaching.
5. Return to the original proposal of the Faculty Evaluation Committee to synchronize all evaluations on the same timeline by switching the FAR reporting period from October 1 - September 30. This aligns with the timeline for probationary review and tenure & promotion review. Again, heads could have a considerably longer time to complete letters for merit pay, and these could be done well in advance of the HR deadline.
6. NOTE: during discussion, some heads pointed out that whatever the timeline, goal-setting meetings should happen *before* the evaluation period begins.

**In response to this request**, a subcommittee of the Faculty Handbook Committee has developed the following proposal. We looked at a number of different options, but required deadlines for reports to the Board of Regents and Human Resources necessarily affect the timeline.

* Reviews would be completed on a calendar-year basis, January 1-December 31.
  + All faculty would receive one evaluation letter per year which would include merit designations.
    - We are recommending that probationary, term, and renewable term faculty members receive one letter from the department head in their first year on the same timeline as other faculty being evaluated. This is because faculty in their first semester often have little to report. We do recommend that PACs evaluate **teaching** in the fall of the first year. After the first year, probationary faculty, term, and renewable term faculty will be on the same timeline as other action cases (first column on the left). Of course, should a department decide that they would prefer to follow the timeline for action cases for first year faculty, that should be specified in departmental Standards & Criteria.
    - Action cases receive one letter, in February, with merit designations.
* Annual goals meetings for new faculty would be conducted in August-September; for all other faculty, these meetings would occur between November-February.
* Annual Goals & Reflection Documents would be due in October (with supplement if necessary in January for items occurring between October 16-December 31) for probationary/action cases. Annual Goals and Reflections documents would be due in February (for the previous calendar year) for tenured/non-action cases. By the time a probationary faculty member reaches the third year, the supplemental addition shouldn’t be necessary.

|  | **Probationary**, **Term**,  **Renewable Term**  **Action Cases**    3rd Year Review    Tenure    Promotion    Post Tenure Review (Comprehensive) | **Non-Action Cases:**  **Tenured Faculty**  **Adjunct Faculty**  **Post-Tenure Review** (Summary) | **First Year Probationary, Term**  **Renewable Term faculty** |
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| *Aug-Sept* |  |  | *Goals Meetings for new faculty only* |
| October 15 | Deadline for Submission of Materials for Jan 1 through Oct 15 (Annual Goals & Reflection Doc, used to be uFAR) | No October Submission for Non-Action Cases and Post-Tenure Review (summary) Cases | Deadline for Submission of Materials for Teaching/Librarianship standards only  PAC does teaching observations |
| December 15 | PAC Reports are due | No PAC review/report unless required by PAC procedures or requested the faculty member | PAC report for first-year faculty on Teaching/Librarianship only are due |
| *Nov-Feb* | *Annual Goals Meetings* | *Annual Goals Meetings* | *N/A: Goals Meeting completed Aug-Sept* |
| January (by the end of the first week of classes) | *Optional: supplementary submissions for consideration in Annual Review* (Oct 16-Dec 31) | not applicable | not applicable: additional materials will be submitted with the Annual Goals and Reflection |
| February 1 | Dept Head Annual Review Evals  (includes merit rating) | nothing due from Dept Head (happens May 10-15) | nothing due from Dept Head (happens May 10-15) |
| February 1 | not applicable, materials already complete | Deadline for Submission of Materials for Annual Review and (Annual Goals & Reflection Doc, used to be uFAR) (past calendar year) | Deadline for Submission of Materials for Teaching, Scholarship, and Service for Annual Review and (Annual Goals & Reflection Doc, used to be uFAR) (since hiring in fall) |
| March 1 | Provost Letters  Dean Letters | not applicable | not applicable |
| April 30 | Request Consideration for Promotion/Promotion & Tenure | Request Consideration for Promotion/Promotion & Tenure | not applicable |
| May 10-15 | Merit scores received on Feb. letter; scores to Provost’s Office | Department Head Annual Review Letters written and distributed  Merit scores to Provost’s Office | Department Head Annual Review Letters written and distributed  Merit scores to Provost’s Office |