

Performance Review Dos and Don'ts

A check list for performance evaluation for Luther College Academic Staff Members

DO get a copy of the collective agreement and refer to Article 16 - Performance of Duties and Article 17 - Performance Review. Hard copies of the collective agreement are available at the URFA office, or an online version is available at www.urfa.ca.

DO get a copy of the Faculty Criteria Document from the Dean's office, and review the duties on which you will be evaluated and the relative weights of these duties.

DO pay particular attention to the **performance review sequence dates** as outlined in the collective agreement:

- **November 30** – deadline to apply for tenure, promotion and/or to submit intention to apply for merit, and provide supporting documentation (submitted to the Dean) (A. 17.8).
- **November 30** – deadline for academic staff members not due for a performance review to request one.
- **November 30** – deadline to submit three referees for academic staff members applying for promotion to Professor or Librarian IV, or applying to be considered for tenure.
- **November 30** – deadline for notification of tenure-track faculty members subject to earlier-than-normal review (A. 17.3).
- **December 15** – deadline for academic staff members with tenure-track appointments to submit Annual Information Forms and supporting documentation to the Dean (A. 17.7).
- **December 31** – end of the review period under consideration (A. 17.5).
- **January 31** – deadline for academic staff members with term or tenured appointments to submit Annual Information Forms and supporting documentation (A. 17.7)
- **January 31** – deadline to submit application for merit and supporting documentation.
- **March 31** – deadline for academic staff with tenure-track appointments to be informed concerning renewal of appointment or granting of tenure.
- **Within 30 days of notification and no later than April 30** – deadline for academic staff members to file notice of appeal with URFA of the non-renewal of a tenure-track appointment or the denial of tenure.
- **June 30** – deadline for academic staff to be informed about granting of increment, merit and promotion.
- **Before July 1** – deadline by which faculty with continuing appointments must be notified by their Deans or equivalents that they will be reviewed out of the normal review cycle (A. 17.2.2).

- **July 1** – decision on career progress takes effect; increments awarded to academic staff members not being reviewed; deadline for Dean or equivalent to inform academic staff members not normally due to be reviewed that a review will occur.
- **July 31** – deadline for academic staff members to file notice of appeal with URFA.
- **July 31** – deadline to provide written notification to the Chair of URFA of intent to appeal a career decision affecting career growth increments, merit increments and promotion (A. 18.8.2).

DO pay particular attention to the **sabbatical dates** as outlined in the Collective Agreement:

- **October 1** – deadline to apply for a sabbatical in the ensuing academic year.
- **By December 31** – deadline for Dean or equivalent to notify academic staff members of decision.
- **By February 28** – deadline for academic staff members to cancel a sabbatical that has already been granted.

DO complete the documentation in its entirety.

DO attach an updated Curriculum Vitae.
THIS IS A MUST FOR TENURE, PROMOTION AND SPECIAL CONSIDERATION.

DO include complimentary testimonials, especially unsolicited ones, from students, conferences, colleagues, etc.

DO record all service and achievements that may reflect meritorious performance relative to the duties outlined in the criteria document.

DO record any papers that have been accepted for publication even though they have not been published. A copy of the acceptance letter should be attached.

DO keep a record of any special circumstance that may have affected your performance in the event that your performance is rated less than positively. For example: maternity or paternal leave, illness, tragedy in the family.

DON'T assume your colleagues or your Dean are aware of your research agenda or other accomplishments. It is your responsibility to highlight these achievements.

DON'T gloss over achievements which you consider mundane or trivial; they may not be to your evaluators.

DON'T hesitate to reach out to the Faculty Association if you have questions. Contact URFA and a Member Services Officer will be assigned to assist you.

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