

Periodic Evaluation for Temporary Faculty & Tenured Faculty

Schedule, Processes, Procedures, Guidelines



Topics to be Covered

Info session for **Periodic Evaluations for Probationary Faculty** was held on 10/3/23; notes found [here](#).

For Tenured PE ([memo here](#))

1. Review Schedule
2. Committees
3. Interfolio Templates/Cases
4. Student Feedback Surveys
5. Evaluative Letters

For Temporary Faculty PE ([memo here](#))

1. Review Schedule / 3 Year Contract Eligibility
2. Committees
3. Interfolio Templates/Cases
4. Student Feedback Surveys
5. Evaluative Forms



Order of Hire

*Not a part of the evaluation process, however, questions come up quite a bit about it.

- **Order of Hire is apart of the appointment's process and is the responsibility of your chair/director. Should they have questions, here is how you can support them:**
 - Direct them to the [Appointments & Workload Guidelines](#) in SharePoint (under Appointment Documents > Workload & Reduction)
 - See the [CBA section 12.29](#)
 - Contact Academic Labor Relations (Sasha Chizhik, sasha.chizhik@sdsu.edu)



Review Schedule

For Tenured Faculty:

Every 5 years; since last performance review or periodic evaluation.

My last review or hire date was:	When is my next review?	What period will I be reviewed on?
AY 2014/2015	Spring 2020	2015/2016 – Fall 2019
AY 2015/2016	Spring 2021	2016/2017 – Fall 2020
AY 2016/2017	Spring 2022	2017/2018 – Fall 2021
AY 2017/2018	Spring 2023	2018/2019 – Fall 2022
AY 2018/2019	Spring 2024	2019/2020 – Fall 2023
AY 2019/2020	Spring 2025	2020/2021 – Fall 2024
AY 2020/2021	Spring 2026	2021/2022 – Fall 2025
AY 2021/2022	Spring 2027	2022/2023 – Fall 2026
AY 2022/2023	Spring 2028	2023/2024 – Fall 2027
AY 2023/2024	Spring 2029	2024/2025 – Fall 2028
AY 2024/2025	Spring 2030	2025/2026 – Fall 2029
AY 2025/2026	Spring 2031	2026/2027 – Fall 2030

Review Schedule

For Temporary Faculty:

- One semester (**Fall only**) faculty – if there is intention to reappoint, can create a case by **Dec 31**. Student feedback surveys to be uploaded by dept/school or college in Spring. ([memo here](#))
- One semester (**Spring only**) faculty – if there is intention to reappoint, units can require additional materials (per their policy files), so long as it is communicated no later than 14 days after the first day of instruction (**January 31, 2024**).
- Temporary faculty members on a **1-year contract** (aka faculty with a similar assignment entitlement) **must** undergo an annual periodic evaluation.
- Temporary faculty members requesting an **initial 3-year contract** **must** undergo a cumulative periodic evaluation, after an entire 6-year period has been worked on a single campus in a single department to become eligible.
- Temporary faculty members requesting a **subsequent 3-year contract** **must** undergo a cumulative periodic evaluation of the entire 3-year appointment, prior to reappointment.



Eligibility Reports

For Temporary Faculty:

- **1-year contract** – eligibility report will be provided
- **Initial 3-year contract** – eligibility will be self-reported and validated by university
- **Renewal/subsequent 3-year contract** – eligibility report will be provided

Eligibility Lists are located in [SharePoint](#).

3-year contracts are optional; evaluations are not optional.

Steps to process an initial 3-year contract evaluation:

1. Faculty must request a cumulative review case be created for an initial 3-year contract.
2. They complete the cover sheet and mark the semesters worked in an entire 6-year period.
3. Staff check initial cumulative cases, cross-reference candidate self-reported form/cover sheet with PAF records to see if they are eligible.
4. If eligible, proceed. If there are discrepancies between department/school records and staff reporting, contact AARM for further verification of eligibility.
5. If ineligible, communicate that to faculty member, close cumulative case, and create an annual periodic evaluation case for them to submit.



Eligibility for 3 Year Contract

APPENDIX F

Eligibility Criteria for One-Year (Provision 12.3) and Three-Year (Provision 12.12) Appointments

Semester Campus Rule:

Must work 2 consecutive terms in prior academic year and only first 2 consecutive terms count in establishing entitlement. Fall is first term of the year.

Semester Campus Example:

Academic Year #1 Work Assignment				Academic Year #2 1-year entitlement if appointed in Fall?		Does AY #1 Service Count Toward 6 Years required under 12.12?	
	Fall	Spring	Summer				
1	9	6		1	1 year for 15 WTUs	1	Yes
2	9	6	3	2	1 year for 15 WTUs	2	Yes
3		6	3	3	1 year for 9 WTUs	3	Yes
4	9			4	no 1-year entitlement	4	Yes
5		6		5	no 1-year entitlement	5	Yes
6			3	6	no 1-year entitlement	6	No

Reviewers for Periodic Evaluation

For Tenured Fac PE

1. Dept/School Committee
2. Dept Chair/School Director

For Temporary Fac PE

1. Dept/School Committee
2. Dept Chair/School Director
3. Dean (for cumulative PE only)*

***no personnel decision**

(Just formative feedback without consequence.)

***personnel decision**



Committees

- A **minimum of three (3)** tenured faculty members are needed to constitute a peer review committee.
- For **reappointment and tenure consideration**, reviewers must be tenured faculty employees of any rank.
- For **promotion consideration**, reviewers shall have higher rank than those being considered for promotion.
- For **post-tenure review**, reviewers must be tenured faculty employees of any rank.
- For **temporary faculty** evaluations, reviewers must be tenured faculty employees of any rank.

Instructions for constituting committees can be found in Reviewer Guide and Staff Guide.

FASS highly encourages committee elections to be held in the Spring.

Committees are now published on our website [here](#).



Non-Submission of Materials

TEMPORARY FACULTY WHO DO NOT SUBMIT:

All temporary faculty who are scheduled for evaluation are expected to provide a complete set of materials by the deadline. Temporary faculty who do not provide a complete set of materials by the deadline cannot be evaluated fairly by academic units and thus cannot be provided careful consideration for work in the subsequent AY. Faculty and administrators who evaluate temporary faculty members should not offer an evaluation (i.e., “satisfactory” or “unsatisfactory”) if complete materials are not provided by the candidate. Academic units should not offer work unless the chair or director has checked the PAF to ensure an evaluation is on file and signed the PAF log. It is not advisable to reappoint temporary faculty who are evaluated as ‘unsatisfactory.’

Evaluation is required for reappointment. If you are a Fall-only faculty member, you may contact your college RTP rep to make arrangements to submit your packet in Interfolio before December 31, 2023.



Student Feedback Surveys

- Evaluation requirements are influenced by Explorance capabilities (prior data may no longer be available (i.e., dept/course avg, etc.)
- Spring 2020 (COVID-impact/pivot semester)
- Spring 2022 (COVID-impact/pivot semester)
- Fall 2022 (Explorance low response rates)
- What happens to student feedback surveys for Fall only faculty who opt for **evaluation**? We anticipate student feedback survey reports will be available in early January. Required materials that are not available to the faculty member must be provided by the university—in this case, the Dean's Office or departments.
- **Staff FAQs: contact the Feedback Survey Team (sdsu_surveys@sdsu.edu)**
- **FAQs found here: my.sdsu.edu/faculty/faq**



Interfolio (part 1 of 3)

- **Staff Permissions found [here](#)**
 - College RTP Reps = Administrators
 - Administrative Coordinators = Case Managers
 - Case Managers do not have access to the activity log; **please contact College RTP Rep or FASS if you need activity log information.**
- **Faculty Permissions**
 - Do not assign as committee managers or any other designation
- **Users & Groups Features**
 - Make sure new temp fac are entered as a user before creating a case
 - Be sure to use their SDSU email



Interfolio (part 2 of 3)

- **Templates**

- Use the correct template
- You may add a section to **periodic evaluation templates** to account for additional criteria required by college or department/school policy
- Departments must notify candidates no later than 14 days after the start of instruction for the term (Jan 31) of criteria they want included in the evaluation.



Interfolio (part 3 of 3)

- Cover Sheet

Initial 3-Year Contract Eligibility ✕

If you are requesting an initial 3-year contract, please mark the semesters worked in an entire 6-year period in a single department. See CBA Appendix F for more details.

	Fall ✕	Spring ✕	Summer ✕	Enter new column
Year 1 - 2018/2019 ✕	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Year 2 - 2019/2020 ✕	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Year 3 - 2020/2021 ✕	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Year 4 - 2021/2022 ✕	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Year 5 - 2022/2023 ✕	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Year 6 - 2023/2024 ✕	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Enter new row				

Evaluative Letters or Forms

For Tenured Fac PEs:

- Use the sample letter

— Periodic Evaluations: Information for Reviewers

- [Reviewer Guide to Interfolio Periodic Evaluations](#)
- [Sample Periodic Evaluation Letter for Tenured & Probationary Faculty](#)
- [Guidelines for Assessing Teaching Effectiveness](#)
- [Suggestions for Reviewing Teaching Effectiveness \(Senate Criteria\)](#)
- [Interfolio Help for Reviewers](#)

For Temp Fac PEs:

- Use the form

— Periodic Evaluations: Information for Reviewers

- [Reviewer Guide to Interfolio PE](#)
- [Periodic Evaluation Form - Department/School](#)
- [Periodic Evaluation Form - Dean or designee](#)
- [Instructions for Associate Deans on Accessing Average Course Grades](#)
- [Guidelines for Assessing Teaching Effectiveness](#)
- [Interfolio Help for Reviewers](#)



Printing Evaluations & PAF Filing

FASS is the custodian of the Official Personnel Action Files (PAF) for Tenured/Tenure-Track Faculty.

Departments/Schools are the custodian of the Official Personnel Action Files (PAF) for Temporary Faculty.

There is no policy that states that departments or colleges must keep a Working Personnel Action File (WPAF).

For Periodic Evaluation

- **Evaluative Letters**
 - Department/School Committee
 - Department Chair/School Director

It is not required to print and file submitted materials.



Website

- 108 documents updated every AY
- Many of your answers reside here: fa.sdsu.edu
 - If a candidate is asking the question, look in the candidate section for an answer.
 - If a reviewer is asking the question, look in the reviewer section for the answer.
 - If you (staff) have a question, look in the staff section for the answer and/or ask your college RTP Rep.
- [Peer Observations](#) (**NEW** 16-page guide, includes templates, etc.)



Any Questions?

Office of Faculty Advancement and Student Success

Have a question and need to know who to ask?

[FACULTY FAQs](#)

[STAFF FAQs](#)

Contact College RTP Rep

Contact Kavalya Fletcher, FASS

