



**MEMORANDUM**

TO: Chancellors, Deans, Vice Chancellors, Associate Deans, Chairs, and Directors

FROM: Laura Hill, Senior Vice Provost 

SUBJECT: 2023 Faculty and Administrative Professional Staff Annual Reviews

DATE: December 13, 2023

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The annual review process combines annual reviews, progress toward tenure, and third-year reviews. Similar to previous years, Activity Insight is to be used by all faculty in submitting their annual review information. Please see [this memorandum about new fields in Activity Insight](#) for faculty to record activities related to institutional priorities.

Please note that an annual review is intended to be developmental, not solely critical. It is an opportunity to recognize all positive contributions that a faculty member has made. If there are areas for improvement, it is important to set specific goals and expectations in writing.

Below please find detailed information regarding the abridged, comprehensive, and intensive reviews. Following the instructions of this memorandum is important to prevent misunderstandings and to ensure promotions are made objectively, equitably, and impartially.

***Abridged Review (Short-form annual review)***

The abridged review is conducted every other year for tenured and non-tenure track faculty making satisfactory progress. The faculty member must submit an updated Activity Insight report, updated curriculum vitae, and a short description of accomplishments since their last review.

The review is performed by the department chair/school director (or their designee) using the [Abridged Review Administrative Form](#) with input from the respective campus, as appropriate. The faculty member will be given a rating of "satisfactory or better" or "less than satisfactory." If the annual review rating is "less than satisfactory," the written report must include an explanation for the decision *with specific written guidance for how to improve*, and all subsequent annual reviews will be comprehensive or intensive until a rating of "satisfactory or better" is achieved. Additionally, an invitation should be extended from the department chair/school director to meet and discuss the review.

***Comprehensive Review (Annual review)***

The following individuals must complete a comprehensive review:

- Pre-tenure faculty (every year)
- Tenured faculty (every other year)
- Career-track faculty (every other year)
- When requested by the faculty member or chair/director

The materials to be submitted include an updated Activity Insight report, updated curriculum vitae, and a summary of accomplishments, which includes an overview of the position (including percentages of appointment), teaching accomplishments, research contributions, and service accomplishments.

If the faculty member is pre-tenure, the summary should include a review of annual accomplishments as well as a cumulative review of progress toward tenure.

The comprehensive review is performed by the department chair/school director in consultation with appropriate faculty supervisors at the WSU Everett, Pullman, Spokane, Tri-Cities, and Vancouver campuses, research and extension centers, or other locations as appropriate. Each comprehensive review will result in a written report from the chair, using the [Comprehensive Review Administrative Form](#), to the dean and vice chancellor for academic affairs (depending on college and WSU campus). The report sent to the faculty member should include an invitation to meet face-to-face with the chair, if the faculty member so desires.

If an annual review rating of “some improvement needed” or “substantial improvement needed” is assigned, then the report will include a list of goals and expectations intended to help the faculty member achieve a “satisfactory” or higher annual review rating at the next review, which must be comprehensive or intensive.

***Intensive Reviews (Comprehensive annual review plus cumulative career progress review)***

**The intensive review is a two-part review that includes both a comprehensive annual review and a cumulative career progress review.**

- The comprehensive review is the same as that described above.
- The career progress review evaluates the progress of the candidate toward tenure and/or promotion, provides feedback relative to university and department expectations, identifies area of improvement, and offers recommendations that may assist the candidate in determining future work.

Pre-tenured faculty typically undergo one intensive third-year review, and tenured faculty who are eligible for promotion are strongly encouraged to request an intensive review every four to six years. Comprehensive or intensive reviews must also be conducted in any year following a review with a rating of “Less than Satisfactory” (abridged), “Needs Substantial Improvement” (comprehensive), or “Unsatisfactory” (Intensive).

Please see the [FAQ on third-year reviews for questions related to COVID effects on timing](#).

The materials to be uploaded to the Teams site for the career progress review should be assembled in the order indicated below:

- [Intensive Review Administrative Form](#) (includes dean(s) and chancellor/vice chancellor for academic affairs where applicable, academic director, department chair(s)/school director(s) evaluation in the case of a joint appointment);

- Current curriculum vitae;
- Updated Activity Insight report;
- Comprehensive Reviews/ Past Progress Toward Tenure;
- Statements (e.g., context, scholarship, service, DEI work, COVID impact statement) written by the faculty member (limited to two pages each). Faculty who prefer to do a single, integrated statement may do so; this statement should be limited to 6 pages. [Please see the guidance to faculty on documenting impact.](#) The context statement may include expectations of a faculty member for their work at research stations or regional campuses, the requirement of joint appointments or other special circumstances such as commitments to student groups. Scholarship and service are often adequately represented in the vita. However, if the faculty member would like to clarify the themes of their scholarship and/or service activities, they may provide short statements for the sake of clarity;
- Teaching portfolio (includes goals, responsibilities, evaluations, results and appendix, or exhibits). The narrative is limited to 25 pages for health sciences colleges, and 5 pages for all others. The teaching portfolio should be presented in the approved format. Refer to the *Faculty Manual*, Section III: <https://facsen.wsu.edu/>; and
- Supporting materials (e.g., a statement on the faculty member's progress toward tenure from his or her formal mentor(s), articles).

A Teams site will be provided by the Provost's Office in early January. **Faculty Recommendation Forms will be uploaded onto a private channel within the Teams site.**

**Each intensive review will result in two reports: a comprehensive annual review report and a career progress report.** The chair will meet face-to-face with the candidate to discuss both reports.

#### **Comprehensive Review Procedures for the Intensive Review**

The comprehensive review report is sent by the chair to the dean and campus vice chancellor for academic affairs (dependent on college and WSU campus), and to the faculty member who is being reviewed. The rating given in the comprehensive review report will serve as the annual review rating anywhere an annual review rating is used. The chair should provide the candidate with a copy of the career progress report prior to the face-to-face meeting.

The comprehensive portion of the intensive review is performed by the chair in consultation with appropriate faculty supervisors at the WSU Everett, Spokane, Tri-Cities, and Vancouver campuses, research and extension centers, or other locations as appropriate, and matches the procedure for the comprehensive review outlined above.

### **Cumulative Career Progress Review Procedures for the Intensive Review**

The career progress portion of the intensive review is coordinated by the chair and requires participation from all faculty and administrators eligible to perform tenure or promotion evaluations for the candidate. Unit faculty complete the Intensive Review Faculty Evaluation Form (either the form for [Pre-Tenured Candidates](#) or, for everyone else, the form for [Tenured and Career-Track Faculty](#)).

***For tenured and career-track faculty***, the career progress portion of the review may stay at the department level.

***For pre-tenured faculty only***, the intensive review procedures will match those for final tenure consideration, except that **external professional evaluations are not required**. *For tenured and career-track faculty* seeking feedback, the career progress portion of the review can be limited to the department or college level.

**All materials for each pre-tenure intensive reviews (3<sup>rd</sup> year) should be uploaded to the Teams site by March 29, 2024.**

A determination that the progress toward tenure is “unsatisfactory” can lead to non-reappointment as described in Section III.E.1 of the *Faculty Manual*. In this event, the faculty member may, within twenty-five (25) calendar days after notification of non-reappointment, petition the Faculty Status Committee to review the decision upon allegations either of inadequate consideration, violation of academic freedom, or substantial procedural irregularity.

**Executive Policy (EP) #29 is the operative document that outlines the roles and responsibilities of the chair/director, academic director, dean, and the vice chancellor for academic affairs (VCAA) in the annual review process.** The chair/director is responsible for assigning merit evaluations to all faculty regardless of campus. Academic directors should provide input to the chair/director on all unit faculty located on the academic director’s respective campus at least two weeks before reviews are due to the dean, and the chair/director will explicitly incorporate this input into the annual review narrative. The dean, and VCAA for faculty not located in Pullman, will review the narratives, provide additional commentary, and assign an evaluation before submitting the reviews to the provost. If the dean and VCAA cannot agree on an evaluation for a non-Pullman faculty member, the VCAA may submit a dissenting review.

The original forms for abridged, comprehensive, and intensive reviews should be retained at the college level and a copy should be sent to Human Resource Services. All dissenting reviews are to be forwarded through the dean to the Office of the Provost. Additionally, a spreadsheet containing a roster of all faculty required to undergo an annual review, indicating whether the review was intensive, comprehensive, or abridged, and the ratings assigned must be forwarded to the Provost’s Office.

**Information and any dissenting reviews must be received in the Provost's Office by May 3, 2024 (with the exception of pre-tenure third-year intensive review, due March 29, 2024).**

Fillable forms and frequently asked questions can be found at: <https://provost.wsu.edu/guidelines-and-forms/>. Please use the fillable forms whenever possible. More information regarding the abridged, comprehensive, and intensive reviews can be found in Section III.C.4 of the *Faculty Manual* (<https://facsen.wsu.edu/>).

### ***Activity Insight***

All faculty are required to use Activity Insight (the replacement for WORQS) to compile their annual reviews, regardless of whether they used WORQS in previous years. Login is available at: <https://www.digitalmeasures.com/login/wsu/faculty>. **Please see the [memorandum on new fields added to Activity Insight](#) and encourage faculty to complete the information required by the college and department.**

It is imperative that users review all of the populated personnel information carefully as it has been provided from various university databases. Please report any errors to the appropriate unit administrator, who will ensure the master university database is updated. It will take approximately 5-7 business days for the change to appear within Activity Insight.

The interface has a link to a fully searchable reference guide, updated in 2022, that will help determine where to report specific types of activities. We have also made available two complete, 90-minute Zoom presentations on how to navigate the interface. These resources can be found at <https://provost.wsu.edu/activity-insight>. New materials are added regularly, so kindly refer to the website. The above website also includes a list of all screens and fields required by the university for annual reports. Respective college requirement lists will be available in the near future.

### ***Administrative Professional Reviews***

Annual Review Forms for Administrative Professional employees can be found in the *Business Policy Procedures Manual 60.55*. Human Resource Services must review and approve any alternate AP annual review forms prior to department use. Human Resource Services also maintains a record of all units requesting and using alternate annual review forms and maintains a copy of the review form used by each requesting unit.

Refer to the [Administrative Professional Handbook - Annual Review](#) for information regarding supervisor and employee responsibilities.

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The employee may add comments that disagree with the contents of the annual review. Within 30 days of receipt of a completed and signed performance evaluation, an employee may submit a written request for the Director of Human Resource Services to review alleged irregularities in the use of the approved performance evaluation form and/or procedures.

Thank you for your assistance and dedication to an annual review process for faculty and administrative professional staff that is equitable, fair, and transparent. Please let us know if you have any questions.

Cc: Human Resource Services