


MEMORANDUM

TO: Chancellors, Deans, Vice Chancellors, Associate Deans, Chairs, and Directors
FROM: Elizabeth S. Chilton, Provost and Executive Vice President 
SUBJECT: 2020 Faculty and Administrative Professional Staff Annual Reviews
DATE: November 18, 2020

The annual review process combines annual reviews, progress toward tenure, and third-year reviews. Similar to previous years, Activity Insight will be used by all faculty to submit their annual review information.

Please review the special notes immediately below:

- This year, in the Goals section of Activity Insight, faculty have the opportunity to record impacts of COVID-19 on their teaching, service, research, outreach (both positive, such as teaching innovations, as well as negative impacts). In addition, faculty may submit a COVID-19 statement with their other annual review materials as described below.
- As a reminder, an **intensive review is composed of two parts**: the regular *comprehensive review* of annual performance, and the *career progress review*, which serves to provide feedback and information on progress toward tenure and promotion.
- Please see the attached FAQ on third-year intensive review.

Detailed information regarding the abridged, comprehensive, and intensive reviews can be found below. Please follow the instructions carefully, and don't hesitate to reach out to my office if you have any questions.

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.

This year, for the 2020 annual review, all tenured and career-track faculty will receive an abridged review, unless:

- they are scheduled for an intensive review,
- they request a comprehensive or intensive review, or
- the chair requests a comprehensive 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, 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 for 2020:

- Pre-tenure faculty (every year)
- Tenured and career-track faculty (if they received a rating of Less than Satisfactory on abridged review, Substantial Improvement Needed on a comprehensive review, or Unsatisfactory on an intensive review for 2019)(Faculty in this category may choose to do an intensive review instead)
- 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 career progress review)

The following individuals must complete an Intensive review this year:

- Pre-tenure faculty in their third year, or those who were scheduled for a third-year review in Spring 2020 but deferred

- Tenured and career-track faculty (if they received a rating of Less than Satisfactory on abridged review, Substantial Improvement Needed on a comprehensive review, or Unsatisfactory on an intensive review for 2019) (Faculty in this category may choose to do a comprehensive review instead)

The intensive review is a two-part review that includes both a comprehensive review and a 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).

The materials to be uploaded to the SharePoint 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) written by the faculty member (limited to two pages each). 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 vitae. However, if the faculty member would like to clarify the themes of his or her scholarship and/or service activities, he or she 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 five pages. 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 link to the SharePoint site will be provided by the Provost's Office in early January.
Faculty Recommendation Forms are not uploaded to the SharePoint site. Please see page 5 for the information that is required in the binders.

Each intensive review will result in two reports: a comprehensive 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.

Career Progress Review Procedures for the Intensive Review

The career progress portion of the intensive review is coordinated by the chair and normally 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 Non-Tenure 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 should be uploaded to the SharePoint site and small binders containing originals of the administrative recommendation form and the faculty recommendation forms should be delivered to the Provost's Office for all pre-tenure intensive reviews (3rd year) by April 2, 2021.

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 thirty (30) 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, 2021 (with the exception of pre-tenure third-year intensive review, due April 2, 2021).

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.3 (tenure-track) and Section V.E.2 (non-tenure track) 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>.

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 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. Brief video tutorials on how to utilize specific screens will be available in the near future. 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.

The employee may add comments that disagree with the contents of the annual review. Within 10 working days of receipt of either comments or dissent, the employee must receive written acknowledgement that the second line supervisor has reviewed the statements.

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