Lecturer Evaluator Workshop
By Mary Pons, M.A.
Agenda

• Changes due to COVID-19
• Principles of Being an Evaluator in the Lecturer Evaluation Process
• Universal tasks of a Lecturer Review Committee
• UPS 210.070 and Department Standards for Lecturer Faculty (DSLF)
• Types of Evaluations seen by evaluators
  – Periods of review
  – Workflows for different types of WPAFs
• Department Chair Confirms
  – Responsibilities
  – Resources
• DPRC Review Stage
  – Responsibilities
  – Resources
• Department Chair Review Stage
  – Responsibilities
  – Resources
• Dean Review stage
  – Responsibilities
  – Resources
• Interfolio for Reviewers
Changes to Reviewer Responsibilities

- Beginning in the 2020-2021 Academic Year FAR will no longer be creating binders for the Lecturer Evaluation process
  - All Lecturers, both Part-time and Full-time, will be submitting their WPAFs through Interfolio
    - WPAFs will not be submitted hardcopy
- All Evaluation Statements will be uploaded to the Interfolio platform as a “required document”
  - This requirement has to be fulfilled otherwise the case cannot be forwarded to the next review level within Interfolio
  - FAR has provided new a template:
    - Lecturer Evaluation Form
- The Rebuttal period after each review stage will be conducted through the Interfolio platform
  - New FAR template for Faculty under review – Lecturer Rebuttal Response form
Principles

• Constructive Process
• Confidentiality is paramount
  – Security of the Working Personnel Action File (WPAF)
    • This material and the performance evaluations compiled by each
      review level must be kept confidential
• Ineligibility
  – Both Chairs and DPRC members can be ineligible to evaluate lecturer
  – All members of these review committees must:
    • Be Tenured, in order to evaluate
    • Cannot be on leave at any time during the Academic Year the review is occurring
    • Cannot have any other conflict of interest (i.e. nepotism)
Universal Tasks of a Lecturer Review Committee

• As a member of the Department Peer Review Committee (DPRC), as a Department Chair, or Dean you are responsible for determining how well a faculty member’s WPAF:
  – Meets the criteria for one of the following performance ratings in either UPS 210.070 or in approved Department Standards for Lecturer Faculty
    • Exceeds expectations
    • Satisfactory
    • Needs Improvement
    • Unsatisfactory

• Create a Performance Evaluation statement, which will need to be uploaded to Interfolio as a required document.
  – Each WPAF will require you to make a judgement call, and that judgement call will need to be rationalized:
    • to the faculty member under review
    • the next Review Level
    • And in the cases of Range Elevations, ultimately to the Provost

• Upload the completed performance evaluation statement, run the required rebuttal period, and forward all assigned Interfolio cases by the deadline posted on FAR’s timetable
  – This job requires you to remain on schedule
    • FAR provides an evaluation timeline every year, a copy can be downloaded from our website
    • When Review Committees don’t adhere to that timeline, the amount of time the next review level has to evaluate the WPAF is reduced
Governing Policies for Evaluation Process

- **UPS 210.070 & approved Department Standards for Lecturer Faculty** (for those departments that have them) provide the infrastructure for the Lecturer evaluation process.
  - UPS 210.070 outlines the categories of documents that a Lecturer faculty member should include in their WPAF
    - This document also lists the periods of review, alternative criteria for non-teaching faculty, etc.
  - Approved Department Standards for Lecturer Faculty provide department-specific criteria and rubrics for how to assess a Lecturer WPAF
Types of Lecturer Evaluations

- There are four types of evaluations that Lecturers can undergo and they all have different periods of review, as well as different volumes of required documentation
  - **Annual Periodic**
    - This applies to Lecturer faculty who are hired under an annual contract for either the Academic Year (AY) or the full calendar year (12 mo)
    - The award of another annual contract is usually partially dependent on a satisfactory evaluation
  - **3-Year (Year 3 of 3) Periodic**
    - Applies to faculty who have been awarded a three year contract over three Academic Years (AY) or three full calendar years (12 mo)
    - The evaluation occurs in the final semester before the contract is scheduled to be renewed.
  - **6-Year Comprehensive**
    - Occurs during a faculty member’s 6th consecutive year of employment/service at CSUF
    - This evaluation determines whether a faculty member is awarded a 3-year contract.
  - **Range Elevation**
    - This is a voluntary evaluation that eligible lecturers can undergo to be considered for the next salary range.
    - The final decision for this type of evaluation is made by the Provost
<table>
<thead>
<tr>
<th>Type of Review</th>
<th>Period of Review</th>
<th>Required Volume of Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Periodic Reviews</td>
<td></td>
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</tr>
<tr>
<td>First Annual Periodic Review</td>
<td>First semester of teaching at CSUF</td>
<td>1 semester worth of data and activity documentation</td>
</tr>
<tr>
<td>Subsequent Annual Periodic Reviews</td>
<td>From the day after the previous review was submitted through the current submission deadline</td>
<td>2 semesters worth of data and activity documentation</td>
</tr>
<tr>
<td>Year 3 of 3 Periodic Review</td>
<td>From the beginning of the three year contract through the current submission deadline</td>
<td>5 semesters worth of data and activity documentation</td>
</tr>
<tr>
<td>6-year Comprehensive Review</td>
<td>From the initial appointment through the current submission deadline</td>
<td>11 semesters worth of data and activity documentation</td>
</tr>
<tr>
<td>Range Elevation</td>
<td>From the current submission deadline backwards 5 years</td>
<td>10 semesters worth of data and activity documentation</td>
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</table>
Part-time Lecturer Annual WPAF workflow

- Faculty Submission – 2/22/2021
- DPRC Evaluation due to Candidate – 3/22/2021
- Department Chair Evaluation due to Candidate – 4/26/2021
- Dean review (if needed)
- Department Chair Confirms/Forwards Case – 3/1/2021
- DPRC Chair Forwards Case – 4/5/2021
- Department Chair Forwards Case – 5/6/2021
- College Processing
All Other WPAFs work flow (Except Range Elevations)

Faculty Submission – 2/22/2021

DPRC Evaluation due to Candidate – 3/22/2021

Department Chair Evaluation due to Candidate – 4/26/2021

Dean Evaluation due to Candidate – 5/28/2021

Department Chair Confirms/Forwards Case – 3/1/2021

DPRC Chair Forwards Case – 4/5/2021

Department Chair Forwards Case – 5/6/2021

Dean Forwards case – 6/7/2021
# Lecturer Evaluation Review Levels

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<thead>
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| Chair Checks submitted WPAF for completeness (optional)
| Forwards case to DPRC Review level |

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| Evaluates WPAF material against criteria in UPS 210.070 or DSLF
| Completes performance evaluation statement
| Uploads completed statement to Interfolio
| DPRC chair runs rebuttal period
| DPRC Chair forwards case to Department Chair |

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| Applies only to PT lecturer cases
| The Dean’s offices will have a chance to download what they need for each case for their records
| Forward the case to FAR |

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| FAR audits the case to make sure that everything is included
| Download what we need for the record retention
| Close the Interfolio case |
Department Chair Confirms Responsibilities

• Check that **ALL** Lecturer Faculty members have submitted all of their review packet sections in Interfolio.
  – Spring WPAF submission deadline: **2/22/2021**
  – *Lock* any sections that have not been submitted
• *Optional, not required*: “Unlock” any sections with missing material.
  – Contact Faculty Member about missing material
  – Instruct them to re-submit by March 1\textsuperscript{st}
• The checklist that has been used in the past has now been incorporated into the Interfolio packet, as a form at the bottom.
• Forward cases to DPRC
  – Deadline to do this: **3/1/2021**
Department Chair Confirms: Resources

- FAR Website: [http://www.fullerton.edu/far/](http://www.fullerton.edu/far/)
- Part-time Lecturer Page
- Full-time Lecturer Page
- Range Elevation Page
- Lecturer Evaluator’s guide (pages 4-19)
- Lecturer Evaluation Timetables
- FAR Calendar/Events Page
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<td>Download what we need for the record retention</td>
</tr>
<tr>
<td></td>
<td>Close the Interfolio case</td>
</tr>
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DPRC Responsibilities

• Evaluate submitted material against appropriate UPS 210.070 or DSLF criteria.
• Compose a performance evaluation statement, including a performance ranking, for each faculty member.
  – Rankings from best - worst:
    • Exceeds Expectations
    • Satisfactory
    • Needs Improvement
    • Unsatisfactory

• Specific DPRC Chair responsibilities:
  – Upload the completed performance evaluation to the “required items” box on the “Case details” page of each assigned Interfolio case
  – Share the completed evaluation with the faculty member under review through Interfolio
    • Deadline to do this: 3/22/2021
    • This initiates the 10-calendar day rebuttal period
  – Forward the case to the next review level
    • Deadline to do this: 4/5/2021
New Rebuttal Period Process

- After the performance evaluation is complete and uploaded to each assigned Interfolio case the rebuttal period needs to be initiated.
- To initiate the rebuttal period the completed performance evaluation needs to be shared with the faculty member under review through Interfolio.
- The rebuttal period lasts for **10-calendar days**.
  - Exception: if the 10th calendar day lands on a weekend, extend it to the Monday after
  - This is a **HARD Deadline**
- After the rebuttal period has expired or the faculty member responds, forward the Interfolio Case.
- All communication and notification for this process should come through the email `<noreply@interfolio.com>`
- Process will be performed in a live demonstration at the end of the PowerPoint.
DPRC Review Level Resources

• FAR Website: [http://www.fullerton.edu/far/](http://www.fullerton.edu/far/)
  – Part-time Lecturer Page
  – Full-time Lecturer Page
  – Range Elevation Page
  – FAR Calendar/Events Page

• FAR Form Templates
  – Lecturer Evaluation Form
  – Lecturer Rebuttal Response Form (For reference only)

• Interfolio tutorials
  – How to Login
  – Sharing evaluations through Interfolio
  – Forwarding Interfolio cases
  – Lecturer Evaluator’s guide (pages 20-42)

• Lecturer Evaluation Timetables
# Lecturer Evaluation Review Levels

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<th>DPRC Review</th>
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<td>Chair Checks submitted WPAF for completeness (optional)</td>
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<td>Forwards case to DPRC Review level</td>
<td>Completes performance evaluation statement</td>
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<td>Uploads completed statement to Interfolio</td>
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<td>• Evaluates WPAF material against criteria in UPS 210.070 or DSLF</td>
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**Department Chair Review**

- **DPRC Review**
  - Evaluates WPAF material against criteria in UPS 210.070 or DSLF
  - Completes performance evaluation statement
  - uploads completed statement to Interfolio
  - Run rebuttal period
  - Forward case to next review level

**Dean’s Review Level**

- Evaluates WPAF material against criteria in UPS 210.070 or DSLF
- Completes performance evaluation statement
- Uploads completed statement to Interfolio
- Run rebuttal period
- Forward case to next review level

**College Processing**

- Applies only to PT lecturer cases
- The Dean’s offices will have a chance to download what they need for each case for their records
- Forward the case to FAR

**FAR Processing**

- FAR audits the case to make sure that everything is included
- Download what we need for the record retention
- Close the Interfolio case
Department Chair Responsibilities

REMINDER: The Department Chair’s review stage is **SEPARATE** from the DPRC’s review stage in this evaluation process. You will get access to the material when the DPRC Chair forwards the case to you.

- Evaluate submitted material against appropriate UPS 210.070 or DSLF criteria
- Compose a performance evaluation statement, including a performance ranking, for each faculty member
  - Rankings from best - worst:
    - Exceeds Expectations
    - Satisfactory
    - Needs Improvement
    - Unsatisfactory
- Upload the completed performance evaluation to the “required items” box on the “Case details” page of each assigned Interfolio case
- Share the completed evaluation with the faculty member under review through Interfolio
  - Deadline to do this: **4/26/2021**
  - This initiates the 10-calendar day rebuttal period
- Share a copy of the completed evaluation with the DPRC, through Interfolio
- Forward the case to the next review level
  - Deadline to do this: **5/6/2021**
New Rebuttal Period Process

• After the performance evaluation is complete and uploaded to each assigned Interfolio case the rebuttal period needs to be initiated.
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Dean’s Responsibilities

REMINDER: The Dean will review all Full-time Lecturer cases, all Range elevation cases, and the Year 3 of 3 & 6-Year Comprehensive cases for Part-time Lecturers

* The only time a Dean reviews an annual periodic case for a Part-time Lecturer is if there is a negative recommendation or disagreement between the previous review levels.

- Evaluate submitted material against appropriate UPS 210.070 or DSLF criteria
- Compose a performance evaluation statement, including a performance ranking, for each faculty member
  - Rankings from best - worst:
    - Exceeds Expectations
    - Satisfactory
    - Needs Improvement
    - Unsatisfactory
- Upload the completed performance evaluation to the “required items” box on the “Case details” page of each assigned Interfolio case
- Share the completed evaluation with the faculty member under review through Interfolio
  - Deadline to do this: **5/28/2021**
  - This initiates the 10-calendar day rebuttal period
- Share a copy of the completed evaluation with the DPRC and Department Chair, through Interfolio
- Forward the case to the next review level
  - Deadline to do this: **6/7/2021**
New Rebuttal Period Process

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• Lecturer Evaluation Timetables
Interfolio For Reviewers

• Use the most up-to-date versions of Google Chrome, Firefox, or Safari

• Interfolio can be accessed 1 of 2 ways
  – #1 Through the CSUF Faculty portal: https://my.fullerton.edu/Portal/Dashboard/ It is listed alphabetically on the left-hand menu under “more apps”
  – #2 Logging in directly from the Interfolio Website: https://account.interfolio.com/login
    • If you use this method, bookmark this website as a favorite
FAR Office

Ed Collom
• FAR Director
• Edcollom
• x2778

Mary Pons
• RTP Analyst
• Mpons
• x3705

Nicole Calucag
• SOQ Analyst
• Ncalucag
• x8003

Kelly Marconi
• RTP Coordinator
• Kmarconi
• x8593

Christina Leonard
• Records Retention Coordinator
• Cleonard
• x8005