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
- Departmental Review Stage
  - DPRC
    - Responsibilities
    - Resources
  - Department Chair
    - 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 semester 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 judgment call, and that judgment 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 the Provost’s approved 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 expire.
  - 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>
<td>First Annual Periodic Review</td>
<td>second semester of teaching at CSUF</td>
<td>1 semester worth of data and activity documentation</td>
</tr>
<tr>
<td>Subsequent Annual Periodic</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>
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<tr>
<td>Reviews</td>
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<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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</tbody>
</table>
Part-time Lecturer Annual WPAF work flow

- Faculty Submission – 2/21/2023
- DPRC Evaluation due to Candidate – 3/24/2023
- Department Chair Forwards Case - 4/24/2023
- Department Chair Confirms/Forwards Case – 3/3/2023
- Dean review (If needed) – 5/26/2023
- College Processing

- Department Chair Evaluation due to Candidate - 4/14/2023
All Other WPAFs work flow
### Lecturer Evaluation Review Levels

<table>
<thead>
<tr>
<th><strong>Department Chair Confirms</strong></th>
<th><strong>Department Chair Reviews</strong></th>
<th><strong>DPRC Review</strong></th>
<th><strong>College Processing</strong></th>
</tr>
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<tbody>
<tr>
<td>Chair checks submitted WPAPF for completeness (optional)</td>
<td>The Department Chair and the DPRC have SIMULTANEOUS access to the WPAPF materials</td>
<td>Evaluates WPAPF material against criteria in UPS 210.070 or DSLF</td>
<td>FAR audits the case to make sure that everything is included</td>
</tr>
<tr>
<td>Forwards case to DPRC Review level</td>
<td>The Department Chair runs his or her rebuttal period AFTER the DPRC's</td>
<td>Completes performance evaluation statement</td>
<td>Download what we need for the record retention</td>
</tr>
<tr>
<td></td>
<td></td>
<td>DPRC Chair</td>
<td>Close the Interfolio case</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Uploads completed statement to Interfolio</td>
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<td>Runs rebuttal period</td>
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<td>Forward case to next review level</td>
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### Dean’s Review Level

- 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 Confirms Responsibilities

• Check that ALL Lecturer Faculty members have submitted all of their review packet sections in Interfolio.
  – Spring WPAF submission deadline: 2/21/2023
  – “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 3rd
• 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: 3/3/2023
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
- FAR Lecturer Evaluator Page
- Lecturer Evaluation Guide – Department Chair Confirms Chapter
- Lecturer Evaluation Timetables
- FAR Calendar/Events Page
# Lecturer Evaluation Review Levels

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<th>DPRC Review</th>
<th>Department Chair Review</th>
<th>Dean’s Review Level</th>
<th>College Processing</th>
<th>FAR Processing</th>
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<tr>
<td>- Chair Checks submitted WPAF for completeness (optional)</td>
<td>- The Department Chair and the DPRC have SIMULTANEOUS access to the WPAF materials</td>
<td>- Evaluates WPAF material against criteria in UPS 210.070 or DSLF</td>
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<td>- Completes performance-evaluation statement</td>
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<td>- Uploads completed statement to Interfolio</td>
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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 rating, for each faculty member.

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: 3/24/2023
  - This initiates the 10-calendar day rebuttal period
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 or on a holiday, extend it to the next day the campus is open
  – This is a **HARD Deadline**
• After the rebuttal period has expired or the faculty member responds, let the Department Chair know, so he or she can start his or her evaluation
• All communication and notification for this process should be coming 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/
  – Part-time Lecturer Page
  – Full-time Lecturer Page
  – Range Elevation Page
  – FAR Lecturer Evaluators Page
  – FAR Calendar/Events Page

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

• Interfolio tutorials
  – Review Step Introduction
  – Log-in
  – Finding Assigned Cases
  – Evaluating Submitted Material
  – Uploading Required Evaluation to Each Case
  – Conducting the Rebuttal Period

• Lecturer Evaluation Timetables
## Lecturer Evaluation Review Levels

### Department Chair Confirms
- Chair Checks submitted WPAF for completeness (optional)
- Forwards case to DPRC Review level

### Departmental Review
- The Department Chair and the DPRC have SIMULTANEOUS access to the WPAF materials
- The Department Chair runs his or her rebuttal period AFTER the DPRC's

### DPRC Review
- Evaluates WPAF material against criteria in UPS 210.070 or DSLF
- Completes performance-evaluation statement
- DPRC Chair
  - Uploads completed statement to Interfolio
  - Runs rebuttal period

### Department Chair Review
- Evaluates WPAF material against criteria in UPS 210.070 or DSLF
- Completes performance-evaluation statement
- Uploads completed statement to Interfolio
- Runs 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
- Runs 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
- Downloads what we need for the record retention
- Closes the Interfolio case
Department Chair Responsibilities

REMINDER: The Department Chair’s review stage is simultaneous with the DPRC review stage, however the Department Chair rebuttal period occurs AFTER the DPRC’s

• Evaluate submitted material against appropriate UPS 210.070 or DSLF criteria
• Compose a performance evaluation statement, including a performance rating, for each faculty member
• 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: 4/14/2023
  – This initiates the 10-calendar day rebuttal period
• Forward the case to the next review level
  – Deadline to do this: 4/24/2023
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 be coming through the email <noreply@interfolio.com>

• Process will be performed in a live demonstration at the end of the PowerPoint.
Department Chair Review Level Resources

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  - Forwarding Cases

- Lecturer Evaluation Timetables
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Dean’s Responsibilities

**REMEMBER:** 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 should review an annual periodic case for a Part-time Lecturer is if there is a negative recommendation or disagreement between the previous review levels. Otherwise, it is a choice.*

- Evaluate submitted material against appropriate UPS 210.070 or DSLF criteria
- Compose a performance evaluation statement, including a performance rating, for each faculty member
- 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: **5/26/2023**
  - 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: **6/5/2023**
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 be coming through the email <noreply@interfolio.com>

• Process will be performed in a live demonstration at the end of the PowerPoint.
Dean’s Review Level Resources

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• Interfolio tutorials
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  – Login
  – Finding Assigned Cases
  – Evaluating Submitted Material
  – Uploading the Required Evaluation
  – Sharing the Evaluation & Conducting the Rebuttal Period
  – Forwarding Cases

• 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

Mark Carrier
- FAR Director
- Mcarrier
- x2778

Mary Pons
- Evaluation Analyst
- Mpons
- x3705

Nicole Calucag
- SOQ Analyst
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- x8593