



**FACULTY  
PERFORMANCE  
EVALUATION  
DOCUMENT  
(FPED)**

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## FACULTY PERFORMANCE EVALUATION DOCUMENT (FPED)

### PREAMBLE

#### Principles

Florida Gulf Coast University (FGCU) is a comprehensive institution of higher education for the new millennium. As such, the university provides an environment of dynamic growth and innovative change, which is reflected in teaching and scholarship, curricula, community service, faculty, administration, staff, and facilities. **FGCU affirms that student learning is its primary mission; delivery of the highest quality educational services is central to all its endeavors.** The university is committed to the development of an academic environment that fosters the following principles:

- **Collaboration.** The university practices collaboration in governance, operations, and planning to ensure broad commitment to its mission.
- **Civil environment.** The university is committed to maintaining a professional environment based on mutual respect, honesty, transparency, and academic integrity.
- **Academic freedom.** The faculty and administration acknowledge that academic freedom is the foundation for the creation, transmission, and advancement of knowledge. It is understood that the university vigorously protects freedom of inquiry and expression and fosters a climate of openness in which students, faculty, and staff engage in diversity of perspectives, ideologies, and approaches with tolerance and fairness.
- **Diversity.** The university recognizes that diversity throughout all of its constituencies is a source of renewal and vitality.
- **Faculty productivity.** The university endorses the concept that the work of faculty needs to be defined in ways that realistically reflect the full range of academic, professional, and civic responsibilities. FGCU recognizes the importance of effective teaching in a learning-centered university and affirms the value of faculty applying their expertise in service to the community. The university also affirms that scholarly activity needs to be broadly defined to include areas previously undervalued; nonetheless, all forms of scholarly activity require appropriate validation to assure quality.
- **Equity.** As FGCU embraces non-tenure and tenure-track appointments, the evaluation process for all faculty shall not be prejudicial to any individual.
- **Professional development.** Providing a sense of stability and cohesiveness in the diverse atmosphere of multi-year contracts and tenure requires an institution's commitment to the welfare and development of its employees. The administration and

individual faculty members share the responsibility for professional growth. The administration provides faculty members with the opportunity and resources to continue their professional development. Individual faculty members, in turn, take the initiative in promoting their own growth as teachers, scholars, and, where appropriate, as practitioners. They seek the advice and support of colleagues and mentors.

## **Assessment**

FGCU affirms with one voice that assessment of all functions is necessary for improvement and continual renewal. Through comprehensive and systematic assessment, the university ensures that it provides the highest quality education, scholarly activity, and service to the community. Assessment is the cornerstone of accountability and is the highest priority for accrediting agencies, including the Southern Association of Colleges and Schools (SACS). Consequently, FGCU has developed an Institutional Effectiveness Plan, with full participation of all university constituencies that provides an overall framework and direction for evaluation. Included within this framework are the evaluation of students, the administration, and faculty. The mechanism for faculty evaluation is the Faculty Performance Evaluation Document (FPED).

## **Purpose**

The purpose of this FPED is to provide common criteria, guidelines and procedures for performance evaluation and promotion for all in-unit faculty who hold tenure positions or who have multi-year appointments, both fixed and continuing or modified appointments (e.g., visiting, provisional, affiliate, etc.) are included.

This FPED is within the context of the precepts, values, and principles described above. This FPED is a revision of June 2020 Performance Evaluation Document (FPED).

## **POLICIES AND PRINCIPLES**

The purpose and terms of the Document are consistent with and expound upon the terms of the current Collective Bargaining Agreement (hereinafter CBA) as amended between the FGCU Board of Trustees (BOT), and the Florida Gulf Coast University Chapter of United Faculty of Florida (UFF).

The FPED affirms Article 1.2A of the CBA, which reads: “No existing, new or amended University rule, policy, or Board resolution shall apply to employees in the bargaining unit if it is inconsistent with or conflicts with an express term or provision of the Agreement.”

The FPED specifies basic policies, procedures, and criteria for:

1. CBA Article 8, Appointment;
2. CBA Article 9, Assignment of Responsibilities;
3. CBA Article 10, Employee Performance Evaluations, which addresses the various types of faculty evaluation at FGCU:

- A. Annual Evaluations
  - B. Evaluation of Progress Towards Promotion
  - C. Evaluation of Successive Fixed Multi-year Appointment (FMYA)
  - D. Sustained Performance Evaluations;
4. CBA Article 14, Promotion Procedure, which addresses the Professional Development Plan (PDP), the Annual Performance Development Report (APDR), and the annual evaluations provided by the supervisor; and
  5. CBA Article 15, Multi-Year Appointments and Tenure Status: Extension, Probation, Reappointment.

The FPED also references (a) CBA Article 11, Evaluation File and Article 20, Informal Resolution, Grievances and Arbitration Procedures, and (b) Administrative Codes and Florida Statutes that apply.

The Faculty Senate Bylaws provide basic organizational structure, policies, and procedures that define the faculty's role in University governance. In accordance with the CBA Article 14.D, the FPED serves as a University document.

Florida Gulf Coast University perceives scholarly activity as a broad range of intellectual activities in the areas of teaching, scholarship, and service. It is the responsibility of the Colleges/Units to define the scope and range of scholarly activity in their criteria.

It is expected that all members involved in the evaluation process will act ethically; if, under unusual circumstances, a conflict of interest occurs, faculty members should remove themselves from the proceedings or any participant may refer the situation to the University Faculty Affairs Team.

### **Who Is Covered By These Policies**

The policies in this document apply to all faculty bargaining unit positions that are covered by the CBA. Therefore, all in-unit faculty who hold tenure positions or who have multi-year appointments, both fixed and continuing or modified appointments (e.g., visiting, provisional, affiliate, etc.) are included. Consistent with the CBA between the BOT and UFF, Florida Gulf Coast University chairs and other out-of-unit faculty are excluded from the bargaining unit and thus are not covered by this document.

### **Responsibility**

The university is committed to the professional development and success of all its employees. In keeping with the CBA, the university administration, in collaboration with the faculty, makes performance evaluation decisions regarding annual evaluations; successive fixed multi-year appointments, continuing multi-year appointment extensions, and promotion, tenure, and post-tenure reviews; and performance recognition awards. These decisions are based on the extent to

which the faculty member meets or does not meet the goals and objectives mutually agreed upon in their PDP, consistent with unit criteria and standards.

The CBA outlines factors that, in addition to documented performance, may influence a University's decision to offer an individual faculty member either a successive fixed multi-year appointment, continuing multi-year appointment extension, or tenure (see Article 8.4 and Article 15).

### **Appointment Types**

The CBA defines these types of appointments in Article 8.4., Appointment Types.

- A. **Continuing Multi-Year Appointments (CMYA).** A continuing multi-year appointment is an appointment of contingent duration, consisting of an initial three (3) year term extendible annually on the basis of overall satisfactory annual performance as determined through the criteria, standards, and procedures stipulated in Article 10, Evaluations. FGCU shall provide the option of a CMYA to all new ranked multi-year faculty member hires, with the exception of the appointment status categories listed in Section 8.4 (B) below.
- B. **Fixed Multi Year Appointments (FMYA).** A fixed multi-year appointment is an appointment of fixed duration, two (2) to five (5) years in length, with opportunity for successive appointments. FGCU may offer an FMYA without the option of a CMYA to bargaining unit members in the following categories:
  - (1) Instructors and lecturers;
  - (2) New faculty members who have not yet completed their terminal degree requirements but are required to do so as a condition of continued employment;
  - (3) Eminent Scholars and Research Associates;
  - (4) Tenured faculty who elect to give up their tenured status to take advantage of whatever incentives might be offered by a fixed multi-year appointment;
  - (5) Faculty who have not yet demonstrated instructional effectiveness through prior teaching experience.
  - (6) Faculty on non-recurring sources of funds such as contracts and grants, sponsored research funds, grants and donations trust funds.
- C. **Faculty on "soft money"** such as contracts and grants, sponsored research funds, grants and donations trust funds, and other non-recurring sources of funds.
- D. **Tenure.** Tenure as an appointment is recognized and continued only for those faculty who transferred from USF-Ft. Myers in 1997 and who have achieved such status as of the effective date of this Agreement [CBA]. Tenure guarantees annual appointment for the academic year until voluntary resignation, retirement, removal for just cause, or layoff, but does not extend to administrative appointments.



## FACULTY ASSIGNMENTS

In accordance with the Collective Bargaining Agreement, Article 9, specific course assignments shall be communicated to faculty members no later than six (6) weeks prior to the first business day of the fall semester and six (6) weeks prior to the first business day of the new year (for the spring semester), if practicable. Specific course assignments and additional duties/responsibilities including legislative mandates shall be communicated/noted on the Faculty Assignment Form (FAF). Any subsequent change(s) to assignments should also be subject to stipulations noted in Article 9. Faculty assignments should serve as the foundation of the faculty member's Professional Development Plan.

### **Foundation of the Professional Development Plan**

Evaluation processes and career success are the shared responsibility of all participants—individual faculty members, administrators, Peer Review Committees (PRCs), and the Faculty Affairs Team. FGCU recognizes and appreciates the diversity of faculty roles and responsibilities within the University. Likewise, the administration and the faculty are committed to a faculty development program that provides opportunities and resources for professional growth and advancement within academe.

Each faculty member at FGCU must, in collaboration with their supervisor, prepare a PDP, which is a public document. The PDP reflects the need for a flexible faculty assignment system that is consistent with the units' annual evaluation criteria and standards, and:

- Accommodates the various types and lengths of faculty appointments at FGCU.
- Places student learning at the forefront of all educational activities.
- Fosters quality, integrity, and the search for knowledge.
- Allows for a broad definition of scholarly activity to include creative works and achievements appropriate to the mission of an institution of higher education.
- Encourages innovative and collegial relationships with regional community organizations, businesses, and professionals in education, health care, social services, etc.
- Encourages collaboration across disciplines, colleges, and units.
- Recognizes each faculty member as a unique individual with interests, talents, and strengths whose professional aspirations and goals are influenced by personal needs, career life stages, and expectations of the profession.
- Mutually respects the professional goals of each faculty member and the missions of the unit, department, college, and/or university in faculty assessment and performance evaluation.
- Provides opportunities for recognition, incentives, and rewards that take into account the multi-dimensional aspects of the professorate.
- Provides a just and effective process whereby the knowledge gained is used to enhance faculty achievement and student performance.

- Nurtures collaboration within the university community.

### **Description of the Professional Development Plan**

*The PDP is the cornerstone of all faculty assignment processes at FGCU.* The activities/objectives listed in the signed PDP must be ones that, if performed satisfactorily, ensure that the faculty member meets the unit's annual evaluation standards. Each employee shall be given assignments that would yield activities/objectives on a PDP that "provide equitable opportunities, in relation to other employees in the same department/unit, to meet the required criteria for promotion, for continuing multi-year appointment extensions, for successive fixed multi-year appointment renewals, and for merit salary increases" (Article 9.2.D).

By September 7 (or the next business day if September 7 falls on a weekend or holiday), each faculty member must, in collaboration with their supervisor, finalize a PDP. While teaching is central to the University's mission, individual faculty members may engage in the activities of teaching, scholarship, and service in different degrees and intensities. The responsibilities and objectives in the PDP will reflect the faculty member's professional goals and objectives as well as the needs of the college, unit, and/or University. **Goals represent long-term aspirations of the individual across the duration of the contract; objectives are specific targeted achievements for a defined period.** Each college/unit is encouraged to have a mechanism for sharing the PDPs.

The faculty member may seek guidance and assistance from the PRC in developing the goals and objectives identified in the PDP and in preparing documentation for performance reviews. Such requests for assistance from the PRC, however, must be made in writing by the faculty member. The faculty member may also select a mentor to provide assistance with the development of the PDP.

### **Key Components of the Professional Development Plan**

The content of the PDP, which includes faculty goals and objectives with related activities, will be developed through collaboration between the individual faculty member and the faculty member's supervisor and may include peer input with written consent of the faculty member. Rank, experience, labor and time-intensive activities shall be given appropriate consideration when negotiating assignments and activities/objectives. The PDP is intended to be flexible and can be amended as needed; these amendments must be signed by the supervisor and the faculty member. Once signed, the amended PDP shall be placed in the faculty member's personnel file.

**As with the PDP itself, goals will have a multi-year perspective while objectives have a single year focus and activities defined how the objectives will be met.**

- The PDP will contain a clear statement of the professional activities in which the faculty member will engage to achieve each of their annual objectives. Successful completion of these objectives is the responsibility of the individual faculty member.

- The PDP identifies documentation the faculty member anticipates providing to demonstrate/support performance (Evaluation criteria will be developed in each academic unit).
- The PDP will contain a statement of commitment from the supervisor concerning the allocation of time and other resources necessary for the faculty member to successfully achieve the agreed-upon objectives. It is the administration's responsibility to ensure that the agreed-upon resources are available.

### **Corrective Professional Development Plan**

If the faculty member received an unsatisfactory annual evaluation the previous year in any of the three areas of teaching, scholarship, or service (or the applicable unit-level categories), the PDP will also contain a list of constructive activities to be undertaken during the next successive academic year developed jointly by the faculty member and their supervisor. The list will include specific performance targets that will be achieved in order to remedy the area rated as unsatisfactory during the current year, as well as any resources or assistance needed to facilitate improvement. If requested by a faculty member, in writing, the unit's PRC may provide assistance (Article 10.3A4).

If the faculty member receives an overall unsatisfactory annual evaluation, a Performance Improvement Plan (PIP) will be developed addressing the area(s) of deficiency in place of a PDP for the following year. (See the section in this document that addresses Performance Improvement Plans.)

Should the faculty member anticipate applying for promotion within the next two years, their PDP will include a statement to this effect so as to inform the supervisor's preliminary review of the faculty member's proposed assignments and activities for the coming year.

Unanticipated changes in assignments and responsibilities will be documented as amendments to the PDP and considered when evaluating the individual's performance. A faculty member making substantive changes in listed scholarship or service activities should discuss them with their supervisor. These amendments, along with a statement of the way in which these activities meet the unit's criteria, will be included in the Annual Professional Development Report (APDR) submitted to the supervisor for the evaluation process.

In accordance with Article 9.8 of the CBA, "Scheduled hours for all employees shall not normally exceed forty (40) hours per week. Time shall be allowed within the normal working day for research, teaching, or other activities required of the employee, when a part of the assigned duties."

## ANNUAL EVALUATION CRITERIA

FGCU is a public university that embraces the tripartite responsibility of teaching, scholarship, and service. While teaching is central to the University's mission, individual faculty members may engage in the activities of teaching, scholarship, and service in different degrees and intensities. Successful completion of agreed upon objectives and activities in each category (as described in the signed PDP) ensure a rating of "Meets PDP Objectives". The annual assignment and resources made available to the faculty member must provide equitable opportunities to meet PDP objectives, in relation to other employees in the same department/unit, and to meet the required criteria for promotion, continuing multi-year appointment extensions, successive fixed MYA, and merit salary increases (Article 9.2.D).

Faculty performance will be evaluated based on meeting PDP objectives and activities, using the following three-point scale:

- Meets PDP objectives
- Exceeds PDP objectives
- Does not meet PDP objectives

In addition to the above scale that will be used for each category (teaching, scholarship, service) an overall rating must be assigned for the academic period. The rating will be either **"overall satisfactory"** or **"overall unsatisfactory."** A faculty member who receives a "Meets PDP objectives" or "Exceeds PDP objectives" in two or three categories will receive an "overall satisfactory." A "Does not meet PDP objectives" must be received in at least two categories (teaching, scholarship, service) in order to warrant an "overall unsatisfactory."

**For all faculty members who are eligible for promotion, the supervisor shall include a statement that clearly indicates if the faculty member is making adequate progress toward promotion, and if inadequate progress, identify specifically what the faculty member needs to do to make adequate progress (Article 10.1B)**

Each university college/unit shall develop and maintain standards to evaluate each employee according to criteria specified in CBA Article 10.4. These standards must be consistent with those necessary to maintain University and college/unit accreditations. The employees of each college/unit who are eligible to vote in college/unit governance, working with the administration of the college/unit, shall participate in the development of these criteria and standards.

Each unit's annual evaluation criteria and standards must balance the need for clarity and concreteness, on the one hand, and the equally compelling need for generality and adaptability, on the other hand. Addressing the former is a prerequisite for ensuring consistency and equity; addressing the latter is a prerequisite for dealing fairly but flexibly with the diversity of cases likely to confront a unit's faculty members and supervisors. Creativity and intellectual exploration are crucial ingredients in all successful universities. Because of this, units are encouraged to adopt evaluation criteria and standards that provide incentives for experimentation and innovation, encouraging faculty members to consider projects whose likelihood of long-term success may be

initially uncertain. Each unit's criteria and standards should provide guidance to the faculty members and supervisors confronted by such cases.

Approval of each unit's annual evaluation criteria and standards requires confirmation by a majority vote of its in-unit faculty members (CBA Article 10.3), before advancing to the President or designee for final approval. Owing to this requirement, developing these criteria and standards should be a collaborative undertaking, with final recommendation to the President or designee for approval occurring only after careful deliberation by each unit's faculty.

## **PERFORMANCE REVIEWS**

### **The Review Process**

The review process provides for continuous review and feedback to faculty to ensure professional growth and attainment of faculty and institutional objectives and goals. Performance reviews are conducted for the following categories:

- Annual
- Fixed Multi-year Successive Contract
- Continuing Multi-year Appointments Probationary Review  
Promotion
- Tenure
- Sustained Performance (Post-Tenure)

The review process for each of these categories is described in the following pages. The descriptions include information regarding to whom the review applies, when the review will take place, the period covered by the review, participants, required documentation, outcome, and the discussion and/or consultation process with supervisors, as well as the appeal process, when there is disagreement. All components of and activities related to the performance review process at FGCU must be conducted in full compliance with the CBA and faculty must be copied on all performance recommendations.

If a faculty member believes that there has been a violation of the CBA, there are a number of formal and informal avenues a faculty member may select. Informally, the faculty member should first seek resolution with the supervisor, and concurrently seek advice from the UFF grievance officer regarding informal resolution and/or grievance processes. Formally, faculty may avail themselves of the appeals process, as well as the grievance process in accordance with Article 20 in the CBA within 30 calendar days, or file legal action outside the university and bargaining structures.

### **Evaluator/Supervisor**

The following sections consistently refer to the role of the evaluator/supervisor in the evaluation process. Because the various units in FGCU have adopted different administrative structures, the

supervisor for each unit must be clearly defined in the unit criteria document, which may reference consultation during the evaluation process with the appropriate chief academic administrator in the unit. Regardless of the administrative structure in each unit, every faculty member will have two supervisors (e.g., department chair and dean).

### Colleague Participation

A faculty member may request, in writing, that a colleague observe the review process. The colleague may be their mentor, an FGCU colleague, or a member of the PRC. The colleague, with the faculty member's written consent, may examine all submitted materials and may observe the supervisor's discussion with the faculty member.

### Annual Review

*Note:* If the due date falls on a weekend or holiday, the date of the next business day becomes the due date.

<b>Applies to:</b>	Successive fixed multi-year, continuing contract, and tenured faculty
<b>Period under review:</b>	Previous academic or contract year (typically summer, fall, and spring semesters) including those covered by an academic or professional leave (e.g., sabbatical or professional development).
<b>Timeline:</b>	<p>Performed annually</p> <p><b>Nine Month Faculty</b></p> <ul style="list-style-type: none"> <li>• <b>March 31:</b> APDR/Documentation submitted to the supervisor. Faculty may add documents related to spring performance not available until after the due date.</li> <li>• <b>April 30:</b> Evaluator/supervisor returns proposed draft written annual evaluation to faculty member.</li> <li>• <b>May 6:</b> Draft PDP for next academic year is due from faculty member to evaluator/supervisor.</li> <li>• <b>June 5:</b> The finalized annual evaluation is signed by both parties (evaluator/supervisor and faculty member).</li> <li>• <b>August 7:</b> The evaluator/supervisor returns draft PDP to faculty member.</li> <li>• <b>August 7:</b> Finalized PDP with Performance Improvement Plan (PIP) agreed upon and signed by both parties (for individuals placed on a PIP).</li> <li>• <b>September 7:</b> Finalized PDP agreed upon signed by both parties.</li> </ul> <p><b>Twelve Month Faculty</b></p> <ul style="list-style-type: none"> <li>• <b>No later than May 31:</b> Documentation submitted to the supervisor. Faculty may add documents related to spring performance not available until after the due date.</li> <li>• <b>June 30:</b> Evaluation completed.</li> <li>• <b>July 6:</b> Draft PDP for next academic year.</li> <li>• <b>September 30:</b> Final PDP completed and signed.</li> </ul>

<b>Participants:</b>	<p>Faculty member and supervisor. Input from faculty peers may be sought by supervisor and must be in writing, consistent with provisions of the CBA Article 10.2A.</p> <p>The faculty member may request in writing that a colleague observe the review process.</p> <ul style="list-style-type: none"> <li>• This colleague must be identified to the supervisor in writing as having permission to review all evaluative material.</li> <li>• This colleague may be their mentor, other FGCU faculty colleague, or member of the PRC.</li> <li>• The colleague may examine all submitted material and may observe the supervisor's discussion with the faculty member.</li> <li>• The colleague serves only as an advisor to the faculty member.</li> </ul>
<b>Documentation:</b>	<p>Provided by the faculty member:</p> <ol style="list-style-type: none"> <li>1. Updated curriculum vitae.</li> <li>2. PDP which included faculty assignments and activities, and documented amendments.</li> <li>3. Annual Professional Development Report (APDR), which addresses any substantive changes, and includes statements of how the accomplishment and performance of activities have met PDP objectives.</li> <li>4. Supporting materials should address the assignments and activities identified in the PDP and may include: for teaching: syllabi, student perceptions, self-assessment; for scholarship: scholarly documents; for service: list of University and community activities with chairs or contact people.</li> <li>5. Recommended supporting materials for teaching should include any peer evaluations conducted during the period under review.</li> <li>6. If currently on a PIP, prior Performance Review Reports with recommendations for improvements and supporting documentation.</li> <li>7. Other relevant information such as signed letters from students, colleagues, faculty from other institutions, editors, community members, and practitioners in the field.</li> <li>8. No new materials will be added after the review process begins except for acceptance letters of scholarship and documents related to spring performance not available until after the due date.</li> </ol> <p>Provided by supervisor:</p> <ol style="list-style-type: none"> <li>1. All relevant materials shall be given to the faculty member upon receipt and shall be consistent with the CBA Article 11, which excludes anonymous materials. Any student complaints/comments/feedback that were not handled by the supervisor according to the Administrator's Handling of Student Complaints Procedure (Approved by Faculty Senate and Academic Affairs) may not be used or considered in evaluation of the faculty member.</li> </ol>

<b>Process:</b>	<p>The evaluation process will include two independent assessments: a self-assessment and the supervisor’s assessment.</p> <p>All documentation should be submitted to the supervisor (see timeline for specified dates).</p> <p>The faculty member should set up an appointment with the supervisor to discuss the evaluation by the specified time (see timeline for specified dates).</p>
<b>Reports:</b>	<p>Upon completion of the evaluation, the supervisor prepares a draft Performance Review Report (i.e., a written summary regarding performance).</p> <p>This evaluation must include a statement regarding progress toward reappointment (if applicable) and/or promotion. The summary is shared with the faculty member, who may elect to meet with the supervisor and discuss the specific findings, evaluation ratings, and recommendations.</p> <p>Subsequently, a final Performance Review Report is prepared, which the faculty member will sign as an indication that they have had the opportunity to read the report. Such signature connotes neither agreement nor disagreement with the report. The faculty member may append a written statement to the report.</p> <p>The report and appended statement, if any, are included in the faculty member’s personnel file.</p> <p>If a CMYA faculty member receives an overall satisfactory annual evaluation as defined under Evaluation Criteria in this document, they will receive a one-year contract extension, thereby maintaining a full three-year appointment cycle (CBA Article 15.1B).</p> <p>Should a CMYA for FMYA faculty member receive an “overall unsatisfactory” annual evaluation as defined under Evaluation Criteria in this document, they will be placed on a one-year probation and a PIP listing specific, measurable, and reasonably attainable constructive improvements to be undertaken by the faculty member.</p> <ul style="list-style-type: none"> <li>• It is developed jointly by the faculty member and the supervisor.</li> <li>• The plan will include specific performance targets, any necessary resources or assistance to facilitate improvement, and a timetable for development and periodic supervisory follow-ups.</li> </ul> <p>The PIP and any subsequent information, which shows attainment of goals and objectives identified in the plan, will be included with the Performance Review Report in the faculty member’s personnel file.</p>
<b>Outcome:</b>	<p>An evaluation of the faculty member that states whether the faculty “Exceeds,” “Meets” or “Does Not Meet” PDP objectives.</p>



<b>Response:</b>	<p>Appeal: In the event a fixed multi-year, continuing contract, or tenured faculty member is assessed “overall unsatisfactory” in his or her annual evaluation and disagrees with the evaluation, they may submit a written response to the supervisor, which will be attached to the annual review with a copy to the Dean (see CBA Article 10).</p> <p>If there is no resolution of concerns with the supervisor, the faculty member may seek resolution with the dean/director. If there is no resolution with the dean/director, or if the supervisor is the dean/director, resolution should be sought at the next higher administrative level.</p> <p>Grievance: If the faculty member believes that there has been a violation of the CBA, the faculty member should consult with the UFF-FGCU Grievance Chair and may file a grievance under Article 20 of the CBA, which must be initiated within 30 days of the violation. Alternatively, the faculty member may resort to legal action outside the University and CBA.</p>
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*Note.* Controlling documents include CBA Articles 10, 11, 15, and 20; Administrative Codes; and Florida Statutes

### Successive Fixed Multi-Year Contract Review

***Note: If the due date falls on a weekend or holiday, the date of the next business day becomes the due date.***

<b>Applies to:</b>	Faculty on fixed multi-year contracts
<b>Period under review:</b>	For the first reappointment review, the period from the beginning of the contract to the time of the multi-year reappointment review; for subsequent reappointment reviews, the period from the previous appointment review.
<b>Timeline:</b>	<p>Conducted during the penultimate year of the contract</p> <ul style="list-style-type: none"> <li>• <b>By December 1</b> of the fall of the penultimate year, the University notifies that faculty member in writing that to be considered for a successive fixed multi-year appointment, the faculty member must submit a written request and documentation pursuant to procedures in Article 15.2 of the CBA.</li> <li>• <b>January 6:</b> Faculty notifies supervisor of intent to apply for successive multi-year appointment.</li> <li>• <b>January 30:</b> Faculty submits documentation to the supervisor.</li> <li>• <b>February 1:</b> Faculty member’s documentation made available to PRC for review.</li> <li>• <b>March 30:</b> PRC submits recommendation to the supervisor.</li> <li>• <b>April 7:</b> Supervisor makes recommendation to dean/director.</li> <li>• <b>April 15:</b> Dean/director makes recommendation to the Vice President for Academic Affairs (VPAA).</li> <li>• <b>April 30:</b> VPAA notifies faculty member of their decision whether or not to offer a successive appointment.</li> </ul>

	Please note that this timeline differs from the timelines for tenure and promotion evaluations because reappointment decisions do not go beyond the institutional level.
<b>Participants:</b>	<p>Faculty member, supervisor, PRC, dean/director, VPAA. Input from faculty peers may be sought, but input must be in writing.</p> <p>The faculty member may request in writing that a colleague observe the review process.</p> <ul style="list-style-type: none"> <li>• This colleague must be identified to the supervisor in writing as having permission to review all evaluative material.</li> <li>• This colleague may be their mentor other FGCU faculty colleague.</li> <li>• The colleague may examine all submitted material and may observe the supervisor’s discussion with the faculty member.</li> <li>• The colleague serves only as an advisor to the faculty member.</li> </ul>
<b>Documentation:</b>	<p>Provided by faculty member:</p> <ol style="list-style-type: none"> <li>1. Updated curriculum vitae</li> <li>2. PDP which includes faculty assignments and activities, and documented amendments</li> <li>3. Annual Professional Development Report (APDR), which addresses any substantive changes, and includes statements of how the accomplishment and performance of activities have met or exceeded unit standards</li> <li>4. Annual Professional Development Report (APDR), which includes amendments to the PDP and statements of how the objectives of the PDP have been met.</li> <li>5. Supporting materials should address the goals and objectives identified in the PDP and may include: for teaching: syllabi, student perceptions, self-assessment; for scholarship: scholarly documents; for service: list of university and community activities with chairs or contact people.</li> <li>6. Recommended supporting materials for teaching should include any peer evaluations conducted during the period under review</li> <li>7. Prior Performance Review Reports with recommendations for improvements (if any) and supporting documentation</li> <li>8. Other relevant information such as signed letters from students, colleagues, faculty from other institutions, editors, community members, and practitioners in the field</li> <li>9. No new materials will be added after the review process begins except for acceptance letters of scholarship.</li> </ol> <p>Provided by supervisor:</p> <ol style="list-style-type: none"> <li>1. All relevant materials shall be given to the faculty member upon receipt and shall be consistent with CBA Article 11, which excludes anonymous materials except for student perceptions.</li> </ol>

<b>Process:</b>	<p>The evaluation process will include at least three independent assessments: a self-assessment, the PRC's assessment, and the supervisor's assessment (including the Dean's assessment).</p> <p>All documentation should be submitted to the supervisor by Jan. 30.</p> <p>The supervisor will notify the PRC when the materials are in place for review.</p> <p>Either the PRC or the faculty member may request an initial meeting to review the documentation. This meeting will include the faculty member's colleague if one has been formally identified.</p> <p>The PRC conducts a review and passes its signed evaluation on to the top immediate supervisor (chair or Dean/director) by March 30, with a copy to the faculty member.</p> <p>The supervisor makes recommendation to Dean, with copy to the faculty member. The faculty member shall have the opportunity to attach a written response to the recommendation (see CBA Article 15).</p> <p>The supervisor (if other than the Dean) forwards all the independent assessments and their recommendation to the Dean/director who is responsible for making the final recommendation to the VPAA by April 15.</p> <p>The VPAA notifies the faculty member of their decision whether or not to offer of successive contract or not by April 30. At each step, the faculty member has the opportunity to respond to the recommendation in writing with a copy of the response added to the portfolio.</p>
<b>Reports:</b>	<p>Upon completion of the review, the supervisor prepares a recommendation (i.e., a written summary regarding performance that includes the faculty member's self-assessment, the PRC's assessment, and the supervisor's assessment).</p> <p>The report will include a statement of support or non-support for a successive appointment and a written rationale for the recommendation.</p> <p>The summary is shared with the faculty member, who may append a written statement to the report. The report and appended statement, if any, are included in the faculty member's renewal portfolio.</p>
<b>Outcome:</b>	Recommendation for or against a successive fixed multi-year contract
<b>Response:</b>	<p>Grievance: If the faculty member believes that there has been a violation of the CBA, the faculty member should consult with the UFF-FGCU Grievance Chair and may file a grievance under Article 20 of the CBA, which must be done within 30 days of the violation. Alternatively, the faculty member may resort to legal action outside the action of the university and CBA.</p>

*Note.* Controlling documents include CBA Articles 10, 11, 15, and 20; Administrative Codes; and Florida Statutes

### Continuing Multi-Year Appointment Probation Review

*Note:* If the due date falls on a weekend or holiday, the date of the next business day becomes the due date.

<b>Applies to:</b>	Faculty of Continuing Multi-Year Appointments  Performed in place of the regular Annual Review Process for faculty members placed on probation following the previous year's Annual Review
<b>Period under review:</b>	Previous academic or contract year (typically summer, fall, and spring semesters)
<b>Timeline:</b>	<p><b>Nine Month Faculty</b></p> <ul style="list-style-type: none"> <li>• <b>August 7 of current academic year:</b> PIP finalized.</li> <li>• <b>March 15:</b> Documentation submitted to the supervisor.</li> <li>• <b>March 31:</b> Supervisor report submitted to Dean.</li> <li>• <b>April 30:</b> Notification to faculty member of appointment extension or non-extension, as appropriate.</li> <li>• <b>May 6:</b> Draft PDP for the current academic year.</li> <li>• <b>May 10:</b> Supervisor provides letter of assignment if no PDP received.</li> <li>• <b>September 7 of following academic year:</b> Final PDP completed and signed.</li> </ul> <p><b>Twelve Month Faculty</b></p> <ul style="list-style-type: none"> <li>• <b>September 30 of current academic year:</b> PIP finalized.</li> <li>• <b>March 15:</b> Documentation submitted to the supervisor.</li> <li>• <b>March 31:</b> Supervisor report submitted to Dean.</li> <li>• <b>May 6:</b> Notification to faculty member of appointment extension or non-extension, as appropriate.</li> <li>• <b>June 15:</b> Draft PDP for the current academic year.</li> <li>• <b>June 20:</b> Supervisor provides letter of assignment if no PDP received.</li> <li>• <b>September 30 of following academic year:</b> Final PDP completed and signed.</li> </ul>
<b>Participants:</b>	Faculty member, supervisor, and unit's dean/director  The faculty member may request in writing that a colleague observe the portion of the review process involving the supervisor. <ul style="list-style-type: none"> <li>• This colleague must be identified to the supervisor in writing as having permission to review all evaluative material.</li> <li>• This colleague may be their mentor, other FGCU faculty colleague recommended to be of equal or higher rank, or member of the PRC.</li> <li>• The colleague may examine all material submitted to the supervisor and may observe the supervisor's discussion with the faculty member.</li> <li>• The mentor serves only as an advisor to the faculty member.</li> </ul>

<b>Documentation:</b>	<p>Provided by faculty member (as appropriate):</p> <ol style="list-style-type: none"> <li>1. Updated curriculum vitae.</li> <li>2. PIP in lieu of a PDP.</li> <li>3. Self-evaluation and relevant supporting documentation to demonstrate fulfillment of the PIP.</li> <li>4. Prior Performance Review Reports and supporting documentation.</li> <li>5. Summary document in response to evaluation of PIP performance targets.</li> </ol>
<b>Process:</b>	<p>Subject to initiation of a PIP:</p> <ul style="list-style-type: none"> <li>• The faculty member's supervisor will periodically review with the faculty member their progress in meeting the performance targets agreed upon in the PIP.</li> <li>• All materials for final probation review must be submitted to the supervisor no later than the due date.</li> <li>• The faculty member may set up an appointment with the supervisor to discuss the evaluation and have the opportunity to provide a written response to be included with documentation forwarded by the supervisor.</li> <li>• The unit's dean/director will make the final decision with respect to the faculty member's evaluation and contract extension based on the recommendations and documentation provided.</li> <li>• The faculty member shall have the opportunity to review the final recommendation of their unit's dean/director and, if dissatisfied with the final recommendation, may provide a written response.</li> </ul>
<b>Reports:</b>	<p>The faculty member shall have the right to provide written responses at any level of the review process, to be included in the documentation forwarded.</p> <p>Copies of all forward recommendation shall be provided to the faculty member and supervisor.</p> <p>The unit's dean/director must submit a written report to the VPAA.</p>
<b>Outcome:</b>	<p>If faculty member receives a satisfactory evaluation and recommendation for contract extension, they shall be taken off probation and granted a two-year contract extension, thereby restoring the faculty member to a full three-year CMYA.</p> <p>In the event that the recommendation is against contract extension, no contract extension shall be issued and the faculty member shall have one year remaining on their appointment, without further opportunity for contract continuance.</p>

<b>Response:</b>	<p>Appeal: In the event a continuing multi-year appointment faculty member wishes to respond to the results of a probation review, they have the right to provide written responses at any level of the review process, which is to be included in the documentation forwarded to the next level of review.</p> <p>If a faculty member believes that there has been a violation of the CBA, there are a number of formal and information avenues a faculty member may select.</p> <ul style="list-style-type: none"> <li>• Informally, the faculty member should first seek resolution with the supervisor, and concurrently seek advice from the UFF grievance officer regarding information resolution and/or grievance processes.</li> <li>• If there is no resolution with the supervisor, the faculty member may seek resolution with the dean/director.</li> <li>• Formally, faculty members may avail themselves of Article 20 in the CBA within 30 days of the notification on non-renewal. Alternatively, the faculty member may resort to legal action outside the university and CBA.</li> </ul>
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*Note.* Controlling documents include CBA Articles 10, 11, 15, and 20; Administrative Codes; and Florida Statutes

## **PERFORMANCE IMPROVEMENT PLAN (PIP)**

### **Foundation of the Performance Improvement Plan**

FGCU seeks through the Continuing Multi-year Appointment (CMYA) system to utilize annual evaluations of faculty in a consistent and constructive fashion to foster continuous improvement and accountability. In the event a CMYA faculty member receives an overall unsatisfactory annual evaluation, they will be placed on a one-year probation, with no contract extension for the duration of the probation period. The faculty member will be afforded a reasonable opportunity for remediation through development of a PIP.

### **Description of the Performance Improvement Plan**

A one-year PIP will be required of any Continuing Multi-year Appointment or Fixed Multi-Year Appointment faculty member receiving an overall unsatisfactory annual evaluation (CBA Article 15). The PIP is designed to help remedy the deficiencies responsible for the overall unsatisfactory annual evaluation and to identify specific performance targets for the following academic year. The PIP must be finalized by August 7 (or the next business day if August 7 falls on a weekend or holiday).

### **Key Components of the Performance Improvement Plan**

Based on deficiencies identified in the annual evaluation, the faculty member will draft the PIP. The content of the PIP will be developed through collaboration between the individual faculty member and their supervisor. The faculty member has the option of consulting with the unit's PRC in developing the PIP.

- As is the case for development of a PDP, the faculty member's teaching preferences, plans for scholarship and service, and other performance related activities should be given appropriate consideration, as outlined in Article 9.3, when negotiating activities and objectives.
- The PIP will contain a clear statement of the professional activities in which the faculty member will engage to meet agreed upon performance targets and professional objectives successfully. Successful completion of these activities and meeting the performance targets and professional objectives are the responsibility of the individual faculty member.
- The PIP will clearly identify the evidence for evaluating the faculty member's achievement of the agreed upon performance targets and professional objectives.
- The PIP will contain a statement of commitment concerning the allocation of time and other resources necessary for the faculty member to achieve the agreed-upon performance targets and professional objectives successfully. It is the supervisor's responsibility to see that the agreed upon resources are available.
- The activities and objectives listed on the PIP should be achievable in a normal forty-hour workweek.
- The PIP will identify intermediary dates for review and possible modification of the PIP.
- Both the faculty member and the supervisor will sign the PIP.
- The PIP may be adjusted as agreed upon and signed by both parties to indicate completed portions, changes in the available resources, etc.
- At the time of PIP submission, a faculty member may request in writing that a colleague participate in the PIP development. The colleague may include their mentor, other FGCU colleagues, or a member of the PRC.

## **PROMOTION**

### **Policy**

Refer to CBA Article 14.2, Criteria and Standards, and Article 10, Employee Performance Evaluation.

### **Eligibility**

1. Faculty covered by the CBA are eligible. The procedures and guidelines below are intended to apply to all faculty seeking promotion. It is desirable that in-unit faculty have a voice in the promotion in academic rank of out-of-unit faculty.
2. A faculty member who is applying for promotion must meet the qualifications and criteria for promotion in that rank or level. Faculty members may apply for promotion after completing four (4) full years in rank or level. (See CBA Article 14.1B).

3. Promotion decisions are not solely based on an employee's annual performance evaluations. Rather, the University, through its faculty, professional employees, and administrators, assesses the employee's potential for growth, scholarship, and/or other professionally appropriate contributions as well as past meritorious performance. A faculty member will include a goal regarding progress toward promotion in the annual evaluation. This goal shall be evaluated annually in a separate part of the ADPR; the supervisor shall provide an appraisal toward promotion in a separate part of the annual evaluation (see CBA Articles 10.1B and 14.1C).

### **Principles for Establishing Criteria for Promotion**

1. The University shall identify and publish university-wide criteria for tenure and promotion based on CBA Article 14.
2. Consistent with the University criteria, each college shall:
  - a. Identify, establish and implement college-wide criteria for promotion within the areas of teaching, scholarly/creative activity, and service. All criteria shall allow for diversity in faculty contributions and shall reflect FGCU's traditional emphasis on effective teaching.
  - b. Each college/unit of the University develops promotion standards that outline appropriate objectives for demonstration of teaching, scholarship, and service effectiveness and that are consistent with the University and college/unit criteria.
3. Candidates shall meet college/unit criteria and should therefore refer to their college/unit documents for the standards applicable to them. All candidates should provide clear, concise, and specific evidence relevant to their college/unit's criteria and standards.

### **University Criteria for Promotion**

1. All promotions are governed by the individual's current employment track (instructor, advisor, librarian, ranked faculty).
2. Graduate degree in appropriate discipline, as required by Faculty Credential Manual and the Southern Association of Colleges and Schools (SACS).
3. Completion of four (4) full years in rank or level. Any credit for time in rank or level will be stated in the appointment letter.
4. Performance in the areas of teaching, scholarly/creative activities, and service that meets established college/unit criteria.
5. Submission of a promotion portfolio that accurately reflects and clearly distinguishes their individual accomplishments since appointment or the last promotion. The promotion portfolio



consists of a paper document (portfolio) for administrative review and an identical electronic copy of the portfolio for archival purposes.

### **Pre-Promotion Process**

**Purpose.** The purpose of the pre-promotion review process is to provide faculty members who seek it written non-binding feedback on promotion materials they intend to submit in their promotion portfolio. These materials should be developed in accordance with the promotion criteria and standards established in the respective college/unit. They may choose which materials to submit for review.

**Procedure.** The pre-promotion process is a voluntary non-binding process. The structure and content of the pre-promotion review process shall be determined by vote of in-unit faculty as organized by the college/unit governance structure. The responsibility of the faculty member is to provide evidence of progress toward promotion as determined by the college/unit.

**Review Process.** The faculty member submits the pre-promotion materials to the supervisor by October 1st. The pre-promotion materials are maintained in a secure location that is accessible to authorized reviewers.

**Timeline.** The following dates govern the voluntary pre-promotion timeline. (If the due date falls on a weekend or holiday, the date of the next business day becomes the due date.)

**By November 15th:** Written feedback is provided to the faculty member. The feedback is intended to provide assistance and counseling to the faculty member regarding promotion.

**By December 1st:** The faculty member may schedule a meeting with the authorized reviewer, as determined by the College/Unit, to discuss feedback regarding the pre-promotion materials.

The feedback regarding progress toward promotion is not binding upon the University and shall not be subject to the grievance process. The feedback may be included by the faculty member in the subsequent promotion portfolio.

### **Promotion Portfolio**

In accordance with CBA Article 14.3A, employees applying for promotion shall prepare a paper document (portfolio) for administrative review and an identical electronic copy of the portfolio for archival purposes.

In accordance with Article 14.3A and 14.3B, the promotion portfolio shall minimally include the following:

1. Letter of Intent (copy)
2. Applicable college/unit promotion criteria and standards
3. Up-to-date curriculum vitae

4. Annual Professional Development Plans (PDPs) since appointment or last promotion
5. Annual Performance Development Reports (APDRs) since appointment or last promotion
6. Supervisor evaluations, including ratings received on annual evaluations
7. Pre-promotion appraisals (if employee chooses)
8. Promotion narrative; the Promotion narrative should demonstrate:
  - a. Evidence of qualify and effective teaching, including the candidate's teaching philosophy and experience
  - b. Evidence of quality research/scholarship/or creative activities and how they contribute to teaching and to the discipline
  - c. Evidence of contributions to the department/college/university, community, and/or the profession through service
9. Materials/documentation to support the employee's performance relative to the criteria and standards established for promotion.

### Promotion Review

*Note:* If the due date falls on a weekend or holiday, the date of the next business day becomes the due date.

<b>Applies to:</b>	Promotion review.
<b>Period under review:</b>	All previous years at FGCU at the current rank or level, including those covered by an academic or professional leave (e.g., sabbatical, professional development leave, or Fulbright; does not include medical or family leave) and any years of rank or level credited in the appointment letter.
<b>Timeline:</b>	<p>Faculty members are eligible to apply for promotion after completing four (4) full years in rank or level, and at least one full year at FGCU, before applying for promotion (see CBA Article 14.1B). Promotion deliberations are normally conducted during the spring semester. Promotion decisions normally take effect at the start of the following fall semester.</p> <ul style="list-style-type: none"> <li>• <b>April 1-September 30:</b> The PRC for each unit is elected for the academic year, and the committee chair is elected by the members of the committee.</li> <li>• <b>Through November 15:</b> The PRC will be available, upon request, for consultation with faculty members considering promotion, in accordance with CBA Article 14.3B.</li> <li>• <b>November 30:</b> All faculty members who intend to apply for promotion will submit a letter of intent to the VPAA and copy the letter to their supervisor, the appropriate dean/director, and the chair of the unit's PRCs.</li> <li>• <b>January 15:</b> The faculty candidate for promotion submits documentation in the form of a promotion portfolio to the supervisor.</li> </ul>

	<p>The format of the portfolio is prescribed by the CBA Article 14.3A and by the unit's criteria and standards for promotion. This documentation is maintained in a secured location that is accessible to authorized reviewers.</p> <ul style="list-style-type: none"><li>• <b>January 20:</b> Where applicable, the supervisor sends out promotion materials with pertinent criteria to the person or persons identified as "external reviewers" with instructions that reviews must be returned to the supervisor no later than February 21. Copies of the external reviewers' evaluation(s) will be promptly furnished to the candidate, who shall have five days to attach a brief response, if desired. Both the evaluations and responses, if any, shall be added to the promotion portfolio for consideration by the PRC.</li><li>• <b>By March 7:</b> The PRC reviews the candidate's application for promotion and makes a recommendation regarding promotion that goes to the unit dean/director. The PRC's review shall be taken independently of the supervisor's review. A copy of the PRC's recommendation will be promptly furnished to the candidate, who shall have five days to attach a brief response, if desired. Both the recommendation and response, if any, shall be added to the promotion portfolio for consideration by the unit dean/director.</li><li>• <b>By March 7:</b> The supervisor reviews that candidate's application for promotion and makes a recommendation regarding promotion that goes to the unit dean/director. A copy of the supervisor's evaluation will be promptly furnished to the candidate, who shall have five days to attach a brief response, if desired. Both the evaluation and response, if any, shall be sent to the unit dean/director for inclusion in the portfolio at the dean's stage of review.</li><li>• <b>March 12-March 22:</b> The candidate's dean/director reviews the promotion portfolio and the recommendations from the supervisor and the PRC, and makes a recommendation to the VPAA with a copy to the candidate who shall have five days to attach a brief response, if desired. Both the recommendation and response, if any, shall be sent to the VPAA by March 27.</li><li>• <b>March 27-April 25:</b> The VPAA evaluates the candidate's application for promotion and all accompanying reports and recommendations and makes a decision either to recommend promotion to the University President or to deny promotion. The VPAA communicates this decision to the candidate in writing, consistent with the provisions of the CBA Article 14.4.</li></ul>
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<b>Participants:</b>	<p>Faculty member, supervisor, dean/director, PRC, external reviewers if applicable, and the VPAA.</p> <p>The faculty member may request in writing that a colleague assist the faculty member in the review process.</p> <ul style="list-style-type: none"> <li>• This colleague may be their mentor or other FGCU faculty colleague. The colleague may examine all submitted material and may make recommendations to the faculty member regarding their documentation and the review process.</li> <li>• Neither the faculty member nor the colleague participates in the PRC’s final decision making.</li> </ul> <p>A unit using external reviewers must indicate when they will be used, and include a process for nominating and selecting reviewers as part of its promotion criteria and standards.</p>
<b>Documentation:</b>	<ol style="list-style-type: none"> <li>1. Executive Summary Evaluation relevant to promotion criteria in the college/unit, and teaching, scholarship, service, and other factors as applicable.</li> <li>2. Updated curriculum vitae</li> <li>3. Cumulative information from previous annual reviews</li> <li>4. Current year information equivalent to that provided for annual reviews</li> <li>5. Peer evaluations of teaching, as appropriate</li> <li>6. Review of service, that may include contacting the chairs or people listed on the annual reports</li> <li>7. Documentation of previous years of service credited toward promotion by unit dean/director, if applicable</li> <li>8. External reviewer’s report, as appropriate</li> </ol>
<b>Process:</b>	<p>The evaluation process will include four independent assessments: a self-assessment the PRC’s assessment (including external reviews if applicable), the supervisor’s assessment, and the dean/director’s assessment.</p> <p>Either the PRC or the faculty member may request an initial meeting to review the documentation. This meeting may include the faculty member’s colleague if requested by the faculty member in writing.</p> <p>The promotion process will follow the steps as stated in the timeline above.</p>
<b>Outcome:</b>	<p>Notice of Promotion or Denial (CBA 14.4):</p> <p>A <b>favorable review</b> by the VPAA, approved by the President, will result in promotion to the next academic rank or level, normally at the beginning of the next academic year (August).</p> <p>If an employee receives an <b>unfavorable review</b>/lack of recommendation by the VPAA, the employee may request in writing within ten (10) days of notification of denial, further explanation for the denial based on the established promotion criteria and standards. The VPAA will provide such explanation in writing within twenty (20) days on the request.</p>

<b>Response:</b>	A faculty member who has been denied promotion and believes there has been a violation of CBA or the promotion process may file a grievance under Article 20 of the CBA, which must be done within 30 days of the notification of denial. Alternatively, the faculty member may resort to legal action outside of the university and CBA.
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*Note.* Controlling documents include CBA Articles 10, 11, 14, and 20; Administrative Codes; and Florida Statutes

#### Sustained Performance Evaluations (Post-Tenure Review)

*Note:* If the due date falls on a weekend or holiday, the date of the next business day becomes the due date.

<b>Applies to:</b>	Tenured Faculty
<b>Period under review:</b>	Previous six years
<b>Timeline:</b>	<p>Conducted every seven years following receipt of tenure, or following most recent promotion after receipt of tenure.</p> <ul style="list-style-type: none"> <li>• <b>By November 1:</b> faculty member notified of sustained performance evaluation scheduled for the spring semester.</li> <li>• <b>By December 1:</b> faculty member submits sustained performance evaluation documents to supervisor.</li> <li>• <b>By January 15:</b> supervisor submits summary report to faculty member. The faculty member has five days to provide a written response, if desired.</li> <li>• <b>By January 21:</b> faculty member's sustained performance evaluation documents and supervisor's summary report, along with faculty member's response, if any, forwarded to the PRC.</li> <li>• <b>By February 21:</b> PRC's report and supporting document submitted to the dean with a copy to the faculty member. The faculty member have five days to provide a written response, if desired.</li> <li>• <b>By March 15:</b> Dean submits recommendation and supporting documents to the VPAA with a copy to the faculty member. The faculty member has five days to provide a written response, if desired.</li> <li>• <b>By April 30:</b> VPAA sends faculty member written notification of decision.</li> <li>• <b>By May 6:</b> A faculty member receiving an "unsatisfactory" sustained performance evaluation must begin development of a draft Performance Improvement Plan (PIP).</li> <li>• <b>By September 30:</b> for a faculty member receiving an "unsatisfactory" sustained performance evaluation, final PIP completed and signed.</li> </ul>

<b>Participants:</b>	<p>Faculty member, supervisor, and PRC (see Article 10.3.C.(1)-(2)).</p> <p>The faculty member may request in writing that a colleague assist the faculty member in the review process.</p> <ul style="list-style-type: none"> <li>• The colleague may examine all submitted material and may make a recommendation to the faculty member.</li> <li>• Neither the faculty member nor the colleague participates in the PRC's final decision making.</li> </ul>
<b>Process:</b>	<p>The supervisor prepares a summary report containing their recommendation, as well as the rationale for this recommendation.</p> <ul style="list-style-type: none"> <li>• Copies of the supervisor's report will be promptly furnished to the candidate, who shall have five days to attach a brief response, if desired.</li> <li>• The supervisor's summary report and recommendation, along with the faculty member's sustained performance evaluation documents (including member's appended response to the supervisor's report), are then forwarded to the unit's PRC.</li> </ul> <p>The PRC conducts the sustained performance evaluation and issues a report containing the PRC's assessment and the basis for this assessment.</p> <ul style="list-style-type: none"> <li>• The PRC submits the report to the unit's dean at the same time providing a copy to the faculty member, who shall have five days to provide a written response to the PRC's final report to review by the unit's dean/director.</li> </ul> <p>The Dean writes a report for the VPAA. A copy of the dean's report will be promptly furnished to the candidate, who shall have five days to attach a brief response, if desired.</p> <p>Dean submits his or her recommendation to the VPAA along with the supporting documents (the faculty member's sustained performance evaluation documents, the supervisor's summary report and recommendation, the PRC's report, and any written responses submitted by the faculty member in accordance with the procedures above).</p> <p>The VPAA sends a written notification of his or her decision to the faculty member with a copy to the dean.</p>

<b>Outcomes:</b>	<p><i>Satisfactory</i>—if the faculty member has received “overall satisfactory” annual evaluations during each of the years in the period under review, they must be given a “satisfactory: sustained performance evaluation (see CBA Article 10.3.C.(2)a.)</p> <ul style="list-style-type: none"> <li>• In cases where the faculty member has not received “overall satisfactory: annual evaluations during each of the years in the period under review, they may be given a “satisfactory” sustained performance evaluation based upon documentation of sustained performance overall during the period.</li> <li>• The report may contain specific recommendations for continued professional growth and development that must be in the next PDP.</li> </ul> <p><i>Unsatisfactory</i>—if the faculty member has not received “overall satisfactory” annual evaluations during each of the years in the period under review, and, in addition, has failed to document sustained performance overall during the period, including continued professional growth and development, they may be given in an “unsatisfactory” sustained performance evaluation. In such cases, the report must include a rationale, consistent with CBA Article 10.3C.(2)b.</p> <ul style="list-style-type: none"> <li>• Should the VPAA ultimately concur with the “unsatisfactory” sustained performance evaluation, a PIP listing constructive improvements to be undertaken by the faculty member will be developed in accordance with Articles 10.3C(1)b and 10.3C(2)b.</li> <li>• The PIP and any subsequent information, which shows attainment of goals identified in the improvement plan, will be included with the Performance Review Report in the faculty member’s personnel file.</li> </ul>
<b>Response:</b>	<p>A faculty member who has received an unsatisfactory Sustained Performance Evaluation (SPE) and who believes there has been a violation of CBA or the review process may file a grievance under Article 20 of the CBA, which must be done within 30 days of the notification of an unsatisfactory SPE. Alternatively, the faculty member may resort to legal action outside the university and CBA.</p>

*Note.* Controlling documents include CBA Articles 10, 11, 15, and 20; Administrative Codes; and Florida Statutes

## **PEER REVIEW COMMITTEE (PRC)**

A Peer Review Committees (PRC) will be formed, one for each college/unit:

- College of Arts and Sciences
- Lutgert College of Business
- Marieb College of Health and Human Services
- College of Education
- Whitaker College of Engineering
- University Library
- Daveler & Kauanui School of Entrepreneurship

As new academic units are established, additional PRCs will be created. Each PRC will consist of a minimum of five multi-year and/or tenured faculty members elected from among the in-unit associate and full professors/librarians, instructors II or III, and academic advisors II or III. The qualifications may be waived when there is an insufficient number of faculty members in the college/unit who meet the above mentioned qualifications.

The in-unit faculty in each unit will elect the individuals who will serve on that unit's PRC. PRC members serve for a two-year term and may be re-elected to serve additional terms. The chair of each PRC shall be a member of that committee, elected annually by fellow committee members. The chair will serve a one-year term and can be re-elected for subsequent terms.

During the promotion cycle in which advisors apply for promotion, the PRC may invite an appropriate level in-unit advisor (advisor II or III) to serve as a consultant to the PRC on the advisors' portfolios. The qualifications may be waived when there is an insufficient number of advisory in the college/unit who meet the above mentioned qualifications.

### Chair Responsibilities:

- Convene and facilitate meetings
- Coordinating reviews with the faculty member to be evaluated, the faculty member's supervisor, and any other individuals authorized to participate in the review process.

**PRC Responsibilities:** The committee responsibilities, generally, fall into two categories: (a) stipulated duties and (b) requested guidance and assistance to faculty. Request for assistance must be conveyed in writing by the faculty member to the PRC.

### Stipulated Duties

- Recommendations for successive fixed multi-year appointment and promotion
- Conferring Graduate Faculty Status\*
- Recommendations for Faculty Emeritus



\* Each unit PRC has the authority to select a committee to which to delegate the oversight of graduate faculty status. This committee must be constructed of elected faculty members from the unit.

#### Requested Guidance and Assistance

- PDPs
- PIPs
- Voluntary pre-promotion reviews
- Performance reviews
- Annual reviews
- Interim reviews regarding progress toward promotion and tenure

Conflict of Interest: In cases of a conflict of interest (see Fla. Stat. § 112.3143), the PRC member will recuse themselves from deliberation and the decision making process.

### **FACULTY AFFAIRS TEAM (FAT)**

The FAT serves in an advisory capacity to the Faculty Senate Leadership Team and the Faculty Senate, providing faculty input regarding matters that affect how faculty do their work. In this role, the committee neither usurps nor replaces the formal Grievance Procedure and Arbitration Procedures (see CBA Article 20) and other provisions of the CBA.

The FAT is responsible for:

- Facilitating the establishment and operation of PRCs;
- Reviewing and, if necessary, making recommendations to the individual units and to the VPAA regarding evaluation criteria and outcomes in order to ensure consistency in application of university criteria and implementation of said criteria across the colleges/units;
- Providing counsel regarding transition from fixed multi-year appointments to continuing appointments and vice versa;
- Providing counsel regarding salary and rank equity issues within colleges (e.g., between tenure-line and multi-year contract appointments; between current faculty and new hires; or the availability and allocation of summer appointments);
- Providing guidelines for the development of performance awards by the individual units;
- Providing counsel for allocating professional development and resource support; and
- Establishing guidelines and providing counsel regarding issues that may impact the performance and professional life of the faculty.

The chair of the FAT will be a member of the FAT and will be elected by fellow committee members. The chair will serve a one-year term and can be re-elected to subsequent terms. The chair of the FAT will work closely with the President of the Faculty Senate. Key responsibilities of the chair include, but are not limited to convening meetings, developing meeting agendas, maintaining meeting minutes, and sharing faculty concerns through appropriate channels.

### **FACULTY REVIEW OF ADMINISTRATORS**

The faculty affirms the importance of assessment and evaluation of all of the university's activities and personnel. Furthermore, faculty supports the use of evaluation results to enhance the performance of both the faculty and the administration to improve the quality of FGCU's educational programs and services.

In this context, the FGCU administration invites input from the faculty regarding the leadership performance of supervisors, deans, associate deans, and assistant deans. The formal protocol for such reviews, including the evaluation form, the schedule, and the procedures, are the purview of the FGCU administration and are not covered by this evaluation document; however, it is desirable that the FAT will have a meaningful involvement in the development of the evaluation instrument and process.

### **IMPLEMENTATION**

The provisions of this document were approved by Faculty Senate on March 14, 2008 and full approval in (spring 2008) whereas, the provisions of this Document become effective in spring semester 2009. The document was updated to address nomenclature changes on March 27, 2015 and revisions were made on April 11, 2016. Subsequently, the provisions of this document were approved by Faculty Senate on April 15, 2016 and full approval in (spring 2016). The most recent revision of this Document was in response to changes in the CBA and in the names of two of the units, as well as to the addition of a new unit. It was approved by Faculty Senate on November 9, 2019 and full approval was given on May 20, 2020. The provisions of this Document become effective July 1, 2021.

The FPED will be reviewed annually by the FAT to ensure that it remains effective. Recommendations for modifications or amendments come to the Faculty Senate for consideration. The Faculty Senate, after consultation with the faculty at large, may approve any modification or amendment to the FPED. All changes in the FPED are sent to the VPAA for final approval. Personnel recommendations are to be consistent with the terms and conditions of the CBA. A copy of the modifications and amendments will be distributed to the FGCU UFF chapter.

**2002-2003 FPED APPROVAL DATES:**

Date Approved by Faculty Vote:	December 2002
Date Approved by Faculty Senate:	January 24, 2003
Date Approved by VPAA:	January 29, 2003
Date Approved by Faculty Senate:	April 18, 2003

**2007-2008 FPED APPROVAL DATES:**

Date Approved by Faculty Vote:	December 13, 2007
Date Approved by Faculty Senate:	March 14, 2008
Date Approved by VPAA:	
Date Disseminated by UFF:	

**2015 FPED APPROVAL DATES:**

Date Approved by Faculty Vote:	
Date Approved by Faculty Senate:	March 27, 2015
Date Approved by VPAA:	
Date Disseminated by UFF:	

**2016 FPED APPROVALS DATES:**

Date Approved by Faculty Affairs Team:	April 11, 2016
Date Approved by Faculty Senate:	April 15, 2016
Date Approved by VPAA:	
Date Disseminated by UFF:	

**2019-2020 FPED APPROVALS DATES:**

Date Approved by Faculty Affairs Team:	September 2019
Date Approved by Faculty Senate:	November 9, 2019
Date Approved by VPAA:	May 20, 2020
Date Disseminated by UFF:	June 3, 2020

**2020-2021 FPED APPROVALS DATES:**

Date Approved by Faculty Affairs Team:	
Date Approved by Faculty Senate:	November 6, 2020
Date Approved by VPAA:	December 17, 2020
Date Disseminated by UFF:	January 12, 2021

**2021 FPED APPROVALS DATES:**

Date Approved by Faculty Affairs Team:	March 18, 2021
Date Approved by Faculty Senate:	April 16, 2021
Date Approved by VPAA:	May 26, 2021
Date Disseminated by UFF:	May 28, 2021

## APPENDICES

### Appendix A: University Classification Requirements for Ranked Faculty

#### Minimal Educational Requirements for Faculty

The minimum educational preparation and experience necessary for eligibility for faculty rank are as follows:

##### **Assistant Professor (9003):**

Doctoral degree from an accredited institution or the highest degree appropriate in the field of specialization with a demonstrated record of achievement in teaching, research, and service.

Must meet university criteria for appointment to the rank of Assistant Professor.

##### **Associate Professor (9002):**

Doctoral degree from an accredited institution or the highest degree appropriate in the field of specialization with a demonstrated record of achievement in teaching, research, and service.

Normally will have produced creative work, professional writing, or research in refereed and other professional journals.

Must meet university criteria for appointment to the rank of Associate Professor.

##### **Professor (9001):**

Doctoral degree from an accredited institution or the highest degree appropriate in the field of specialization with a demonstrated record of achievement in teaching, research, and service.

Normally will have produced creative work, professional writing, or research in refereed and other professional journals, and will be a recognized authority in the field of specialization.

Must meet university criteria for appointment to the rank of Professor.

## **Appendix B: University Classification Requirements for Clinical Ranked Faculty**

### **Minimal Educational Requirements for Clinical Faculty**

The minimum educational preparation and experience necessary for eligibility for clinical ranked faculty are as follows:

#### **Clinical Assistant Professor (9XXX):**

Doctoral degree from an accredited institution or the highest terminal/applied degree in their discipline or field of specialization, with evidence of competence in the clinical specialty, which includes teaching and providing service related to their discipline/specialization in clinical, professional, and/or community contexts.

Demonstrates promise of moving toward excellence in scholarship and service that is commensurate to the position of Clinical Assistant Professor.

Must meet University criteria for appointment to the rank of Clinical Assistant Professor.

#### **Clinical Associate Professor (9XXX):**

Doctoral degree from an accredited institution or the highest terminal/applied degree in their discipline or field of specialization, with evidence of a high level of competence in the clinical specialty, which includes teaching and providing service related to their discipline/specialization in clinical, professional, and/or community contexts.

Evidence of a scholarly agenda and service commensurate to the position of Clinical Associate Professor.

Must meet University criteria for appointment to the rank of Clinical Associate Professor.

#### **Clinical Professor (9XXX):**

Doctoral degree from an accredited institution or the highest terminal/applied degree in their discipline or field of specialization, with evidence of a sustained high level of competence in teaching and providing service related to their discipline/specialization in clinical, professional, and/or community contexts.

Evidence of sustained scholarship and service commensurate to the position of Clinical Professor.

Must meet University criteria for appointment to the rank of Clinical Professor.

## **Appendix C: University Classification Requirements for Instructor Levels**

### **Minimal Educational Requirements for Faculty**

The minimum educational preparation and experience necessary for eligibility for Instructor levels are as follows:

#### **Instructor I (9014):**

Master's degree from an accredited institution in an appropriate field of specialization or equivalent qualifications based on professional experience and otherwise qualified to perform assigned duties.

Must meet University criteria for appointment to the level of Instructor I.

#### **Instructor II (9024):**

Master's degree from an accredited institution in an appropriate field of specialization or equivalent qualifications based on professional experience and otherwise qualified to perform assigned duties.

Normally will have demonstrated record of achievement in teaching and service activities at an institution of higher education.

Must meet University criteria for appointment to the level of Instructor II.

#### **Instructor III (9034):**

Master's degree from an accredited institution in an appropriate field of specialization or equivalent qualifications based on professional experience and otherwise qualified to perform assigned duties.

Normally will have demonstrated record of achievement in teaching, professional development/research, and service at an institution of higher education.

Must meet University criteria for appointment to the level of Instructor III

## **Appendix D: University Classification Requirements for Ranked University Librarians**

### **Minimal Educational Requirements for Faculty**

The minimum educational preparation and experience necessary for eligibility for university librarian rank are as follows:

#### **Assistant University Librarian (9055):**

Master's degree from an accredited institution in an appropriate field of specialization or equivalent qualifications based on professional experience and otherwise qualified to perform assigned duties.

Evidence of professional growth through publication, association activities, or other contributions to the field.

Must meet University criteria for appointment to the rank of Assistant University Librarian.

#### **Associate University Librarian (9054):**

Master's degree from an accredited institution in library science and appropriate experience as a professional librarian consistent with university guidelines.

Evidence of professional growth through publication, association activities, or other contributions to the field.

Must meet University criteria for appointment to the rank of Associate University Librarian.

#### **University Librarian (9053):**

Master's degree from an accredited institution in library science and appropriate experience as a professional librarian consistent with university guidelines.

A distinguished record of service in the profession including publications, professional association activity, research, or other major contributions to the field.

Must meet university criteria for appointment to the rank of University Librarian.



## **Appendix E: University Classification Requirements for Academic Advisor Levels**

### **Minimal Educational Requirements for Faculty**

The minimum educational preparation and experience necessary for eligibility for academic advisor levels are as follows:

#### **Academic Advisor I (9173):**

Master's degree from an accredited institution in an appropriate discipline or a bachelor's degree from an accredited institution in an appropriate discipline and two (2) years of appropriate experience at an institution of higher education.

Must meet University and College criteria for appointment to the level of Academic Advisor I.

#### **Academic Advisor II (9174):**

Master's degree from an accredited institution in an appropriate discipline and four (4) years of academic advising or appropriate experience at an institution of higher education; or a bachelor's degree from a regionally accredited institution in an appropriate discipline and six (6) years of academic advising or appropriate experience at an institution of higher education.

Normally will have demonstrated record of achievement in academic advising/instruction and service at an institution of higher education.

Must meet University and College criteria for appointment to the level of Academic Advisor II.

#### **Academic Advisor III (9175):**

Doctoral degree from an accredited institution and appropriate experience, or Master's degree from an accredited institution and eight (8) years of appropriate experience, and demonstrated record of achievement in academic advising/instruction, professional development/scholarship, and service at an institution of higher education.

Must meet University and College criteria for appointment to the level of Academic Advisor III.

## **Appendix F: Performance Activities**

Activities and documents associated with teaching, scholarship, and service respectively. The items in these lists are illustrative of the range of faculty responsibilities and are intended to assist the units in establishing evaluation criteria.

Per Article 14.2 of the CBA, the faculty, in consultation with the supervisors and dean/director, in each college/unit of the university has developed promotion standards and criteria that outline appropriate objectives for demonstration of teaching, scholarship, and service effectiveness. Candidates should refer to their college/unit documents for the standards applicable to them. All candidates should provide clear, concise, and specific evidence relevant to their unit's criteria and standards.

Examples of performance activities and associated evidence might include:

### **Teaching**

Teaching is a continuous record of successful teaching as determined by college criteria. Teaching includes a broad array of activities occurring both inside and outside the classroom, clinical site, laboratory and studio. The primary aim of all teaching is to stimulate, promote, and advance students' learning and educational development.

**Evidence:** The University expects candidates for promotion to present evidence of excellence in teaching from diverse sources. Examples may include:

- Syllabi, class notes, course revisions, examinations, student reports and projects
- Program advising and mentoring of students
- Systematically collected and analyzed peer evaluations and student perceptions of instruction during the period under review
- The development of instructional materials, academic programs, innovative teaching strategies and delivery methods, innovative clinical teaching strategies, and software and videos in support of teaching and academic programs
- Development and presentation of university-sponsored lifelong learning offerings, e.g., workshops, clinics, continuing education programs
- Development and delivery of individualized library instruction or research assistance for students, faculty, staff, special events, and community partnerships
- Sharing relevant and significant course materials and expertise with other faculty members in the university
- Contributions to the development of supportive learning resources, including internships and clinical education and providing for significant opportunities for learning outside regularly scheduled class times
- The development of professional practice programs in such applied disciplines as health care, business, education, government, criminal justice, and human services, and supervising the learning activities and fieldwork of students enrolled in these programs

- The development and implementation of policies and procedures that aid in the analysis, development, and/or management of a library collection that supports the FGCU curriculum.
- Participation in lifelong learning courses and workshops aimed at enhancing teaching excellence and updating specialty area knowledge and expertise.
- Formal public recognition of pedagogical achievement in the form of an outstanding teaching award, grant, or stipend
- Letters of support from faculty peers, professional colleagues, former students, and program participants who can attest to the faculty member's teaching performance
- Teaching/course assessments and demonstrated curricular changes that resulted in improved learning outcomes.

### **Scholarship, Creative Activities, and Professional Development**

Evidence of scholarly/creative/professional development activities relevant to the faculty member's appointment, as determined by the college/unit criteria. Scholarship can be defined in myriad ways. In general, scholarship is the application of activities that use professional expertise to discover, apply, or use knowledge. Areas of scholarship include: basic and applied research, new applications of existing knowledge, integration of knowledge, creative endeavors, and the development and/or analysis of pedagogical methods.

**Evidence:** Include only significant activities that demonstrate quality in scholarship and reflect enhancement to the overall academic performance. Examples of such activities and associated evidence may include:

- Publication of refereed articles, papers, books, chapters of books, and monographs
- Edited works in books or textbooks, translations, abstracts, reviews, or criticisms
- Presentation of papers at professional conferences and meetings
- Cases, non-refereed articles, papers, encyclopedia entries, and reference materials that contribute to the development and dissemination of new knowledge, theoretical perspectives, or ideologies
- Policy position papers and comprehensive studies developed for community clients, government, external agencies or organizations, the university, or the profession
- Musical compositions, artistic performances, paintings, exhibitions, sculptures, and works of performing arts
- Development of new technology and software for research and teaching purposes
- Research grants, fellowships, or external funding received to support scholarly work
- Works in progress - No new materials will be added after the review process begins except for points of clarification as requested by reviewers.
- External validation from practitioners, editors, reviewers, co-authors, and faculty external to FGCU, which attest to the contributions and quality of the faculty member's scholarship

### **Service**

Evidence of effective, professionally-related service is determined by the college/unit criteria. The university values service to the university, profession, community, state, and nation. Faculty members make contributions in as many as four areas: college/unit service, university service,

professional service, and community service. Service is broadly defined as engaging in activities that complement the faculty role, including educational responsibilities outside the classroom, active participation in professional organizations, contribution to committee work, or other assignments within the college/unit, university, and community.

**Evidence:** Service involves the use of professional expertise in a service activity that may be internal or external to the university. Examples of professional service might include:

Service to the college/unit and/or university:

- Active involvement in the governance, program development, and accreditation of departments and/or academic unit, schools, colleges, and the university at large
- Mentoring and providing guidance to faculty colleagues
- Serving on or chairing committees or councils
- Assisting student organizations (clubs, chapters, honor societies) by serving as an advisor, assisting with the development of programs, or coordinating community field trips and projects

Service to the profession:

- Contributing to professional societies and accrediting or licensing boards
- Organizing and conducting conferences, symposia, and workshops
- Serving in leadership positions in professional societies or on licensing boards
- Serving on or chairing professional committees or editorial review boards

Service to the community:

- Contributing to local, state, regional, national, or international bodies, such as health care providers, business organizations, educational institutions, museums, volunteer civic groups, and governmental boards and agencies
- Serving as an advisor, officer, or chair for such groups and assisting in the development, implementation, or assessment of programs

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Approved by Faculty Affairs Team on 3-10-2020. Approved by Faculty Senate on 11-09-2019 and by the VPAA on 5-20-20.

Approved by Faculty Affairs Team on ---. Approved by Faculty Senate on 11-6-2020 and by --- the VPAA on 12-17-2020.