This list of deadlines was compiled to provide guidance about timing of this year's personnel actions. Please direct any questions to your Dean's office or as needed, the Office of the Vice Provost of Academic Personnel at **5-5352**. We welcome your comments and feedback.

For additional references in an accessible format: See the OAA "<u>Deadlines for Academic Personnel Actions</u>" webpage and the PSU Registrar's <u>Academic Calendar</u>.

# TENURE-TRACK (TT) AND NON-TENURE TRACK (NTT) FACULTY

## EMERITUS PROCESS (TT and NTT):

Tenure-track and non-tenure track faculty are eligible to apply for emeritus status (*Faculty Senate report May 10, 2016*) and should follow the regular promotion and tenure cycle or the November-December cycle (strictly for emeritus applications).

## <u>All applications for emeritus review are due to the review committee the cycle BEFORE the faculty member's retirement</u> <u>effective date.</u>

November 3, 2023 (First Friday of November)	February 2, 2024 (First Friday of February)
November-December Emeritus Cycle rank effective January 1, 2024	Regular P&T Cycle rank effective July 1, 2024
Deans submit recommendations and files to the Provost using the	Deans submit recommendations and files to the Provost using the
Dean's Checklist for organizing materials.	Dean's Checklist for organizing materials.

## SABBATICAL LEAVE REQUESTS (TT and NTT):

The guidelines and applications for Sabbatical Leaves can be found on the:

- HR website at: <u>https://www.pdx.edu/human-resources/employee-leaves</u>
- OAA website at: <u>https://www.pdx.edu/faculty-senate/sabbatical-leave</u>
- AAUP CBA, Article 32, Section 7

Schools and colleges may post deadlines for sabbatical applications, but fully approved applications **should be received by HR no later than one term prior to the start of the sabbatical.** Following review of sabbatical applications, Deans are responsible for notifying faculty applicants, and department chairs/directors **no later than one term prior to the start of the sabbatical.** Faculty members must submit 'Sabbatical Leave Reports of Accomplishments' to their Department Chair and Dean **midway through the term of return from sabbatical.** 

## PROMOTION AND TENURE (TT) AND PROMOTION (NTTF) REVIEW PROCESS:

**Promotional Cycle for TT and NTTF.** For further clarification, please see the <u>2020 April 22 - MOA TTF to Delay Promotion and Tenure</u> <u>Review due to the COVID-19</u> and the <u>2021 April 1 - Tenure Track Faculty members hired in the 2020-21 Academic Year access to tenure clock</u> <u>adjustment due to the COVID-19 pandemic</u>.

December 26, 2023 (Last Tuesday in December)
Faculty member submits material pertinent to the reconsideration to the P&T committee chair, or Dept. Chair, as appropriate.
January 9, 2024 (Second Tuesday of January)
Department Chair sends P&T committee and Dept. Chair's recommendations to the academic Dean.
January 30, 2024 (Last Tuesday of January)
The Dean reports all actions taken in a timely manner to the Dept.
Chair and chairperson of the P&T committee.
The Dept. Chair or the chairperson of the P&T committee may
request a conference with the Dean, within five days of being notified of the Dean's recommendation. Such conference must be
held before the Dean's recommendations are forwarded to the
Provost.

**Note: Schools and Colleges may post deadlines that are <u>earlier</u></u> than those in this schedule. If so, please follow the schedule established by your Dean's office and in accordance with the <u>University Promotion and Tenure Guidelines</u> (***Revised and reapproved, June 2018***).** 

#### February 2, 2024 (First Friday of February)

Dean submits recommendations and files to the Provost using the <u>Dean's Checklist</u> for organizing materials.

November 3, 2023 (First Friday of November)	February 2, 2024 (First Friday of February)
Off-Cycle rank effective July 1, 2024	Regular Cycle rank effective July 1, 2024
Deans submit recommendations and files to the Provost using the Dean's Checklist for organizing materials.	Deans submit recommendations and files to the Provost using the Dean's Checklist for organizing materials.

Per the University P&T Guidelines, requests for non-tenure track research faculty promotions may be forwarded to the Provost typically twice yearly. Academic units may choose to set their own timelines for requests for promotion to be submitted to the Dean. For those NTTF-R hired **prior** to September 16, 2014, follow the guidelines included as Appendix IV in the University P&T guidelines.

## ANNUAL PERFORMANCE REVIEWS OF FACULTY BY APPOINTMENT TYPE:

Faculty appointments are defined as (a) non-tenure track or (b) tenure track. Non-tenure track appointments are (a) fixed-term appointments, (b) probationary appointments, or (c) continuous appointments. Tenure track appointments are (a) annual tenure appointments or (b) indefinite tenure appointments. General information and forms for all faculty performance reviews may be found at:

<u>https://www.pdx.edu/academic-affairs/academic-personnel-policies-and-development#pt</u> and <u>https://www.pdx.edu/academic-affairs/academic-personnel-policies-and-development#dean-chair-director-resources</u>.

**Tenure-Track Faculty:** Annual reviews must be completed according to the cycle posted at the end of this document and as stated in the employee's supplemental letter.

**Non-Tenure Track Faculty:** Annual reviews must be completed according to the type of appointment using the appropriate cycle posted at the end of this document.

NTT-Fixed Term Instructional – Departments are required to provide an annual evaluation of the performance of fixed term faculty <u>after</u> the first year consistent with the practices specified in their promotion and tenure guidelines (University P&T Guidelines, Section C. *Definition, Use and Conditions of Faculty Appointments,* 1. *Non-tenure track Appointments*).

NTT-CA Probationary - Non-tenure track instructional faculty members are to be evaluated annually <u>during years 1</u> <u>through 5</u> of the probationary period (*Article 18, Section 2 of the PSU-AAUP Collective Bargaining Agreement*).

NTT-Fixed Term Research - Departments are required to provide an annual evaluation of the performance of fixed term faculty <u>after</u> the first year consistent with the practices specified in their promotion and tenure guidelines (*Article 18, Section 5 of the PSU-AAUP Collective Bargaining Agreement*).

Please note: for those NTTF hired prior to September 16, 2014 who are seeking promotion; follow the guidelines in Appendix IV of the P&T guidelines found at the following link: <u>https://www.pdx.edu/academic-affairs/academic-personnel-policies-and-development#pt</u>.

#### Notice of Intent Not to Reappoint for NTTF: See Article 18, Section 2, of the PSU-AAUP CBA.

**NTT RESEARCH FACULTY:** Non-tenure track research faculty members may be employed for a fixed term, a period of time that runs the length of a particular grant, or an ongoing appointment, without a fixed date, that is contingent on the continued availability of external funding. In all such cases, the appointment must provide the member with at least thirty (30) days' notice of early termination of employment.

**NTT CONTINUOUS APPOINTMENT RELATED CONTRACTS:** Annual reviews are based on departmental processes developed per <u>Article 18 of the PSU-AAUP Collective Bargaining Agreement</u> and **follow the same cycle as tenure related faculty** (except they are reviewed in year 1 and the third-year review is a regular annual review that counts toward the 1-5 annual reviews). See the cycles chart posted at the end of this document.

<u>Probationary Period for NTTF</u>: The University will employ non-tenure track instructional faculty members (NTTFs) on annual contracts during the first six (6) years of employment as an NTTF. The University will automatically renew NTTF annual contacts during the probationary period unless the University provides timely notice to the NTTF. **The University must provide notice of non-renewal of an annual contract during this six-year period to the faculty member according to the timelines in the <u>AAUP CBA Article 18, Section 2(b)</u>, by April 1 of the first year of the probationary period and by <b>January 1 for the second through fifth years of the probationary period.** The non-renewal is effective at the end of that academic year.

The University will evaluate NTTFs annually during years 1 through 5 of the probationary period pursuant to the University and Department Promotion and Tenure Guidelines.

<u>Milestone Review for Continuous Appointment</u>: During the sixth year of the probationary period, the University will evaluate NTTFs for a continuous appointment pursuant to the University and Department Promotion and Tenure Guidelines. The evaluation will result in either an award of continuous appointment or 12-months' notice of termination of employment. Awards of continuous appointment are effective at the beginning of the following academic year (9-month appointments) or fiscal year (12-month appointments).

## NTT POST-CONTINUOUS APPOINTMENT REVIEW (PCAR):

Evaluation following Continuous Appointment. Faculty on a Continuous Appointment are to be evaluated in the fifth (5<sup>th</sup>) year of continuous appointment and then every 5 years following the last evaluation or promotion. The effective date for the award of Continuous Appointment will be September 16<sup>th</sup> for 9-month employees and July 1 for 12-month employees following a successful Milestone Review. The effective date is the start of academic year 1 of the Post-Continuous Appointment.

## Post-Continuous Appointment review dossiers are due first Friday in October.

If a faculty member on Continuous Appointment undergoes a successful promotional review prior to year 5 of the postcontinuous appointment, their next post-continuous appointment review will occur **in the fifth year** after their successful promotional review. The first year of the next 5-year post-continuous appointment review count will start the academic year following the successful review (September 16 for 9-month employees and July 1 for 12-month employees).

## Example Timeline:

POSITIVE Milestone, PCAR, or		
Promotional Review	CYCLE	COUNT
2018-19	Milestone, Promotional, or Post-Continuous Appointment Review Occurs	
9/16/2019	Successful Milestone, Promotion or PCAR Effective Date	Start of AY 1 for the next PCAR cycle
2019-20	Х	1
2020-21	Х	2
2021-22	Х	3
2022-23	Х	4
2023-24	Post Continuous Appointment Review Occurs	5
Positive PCAR	Effective date 9/16/2023	Start of AY 1 of 5
2024-25	Year 1 of 5	1

## PCAR Review Cycle: (Please note: "typically" has been added to accommodate holidays that may bump a business day count.)

October 6, 2023 (First Friday in October)	January 12, 2024 (Second Friday in January)
Faculty submits PCAR dossier.	Should Committee and/or Dept. Chair reverse their original decisions, they shall write a report of the new decision and forward all materials to the Dean.
October 27, 2023 (No later than Last Friday in October)	January 29, 2024*
Committee completes review of eligible faculty and submits report to Dept. Chair.	*PSU closed Monday, January 15 <sup>th</sup> . Dean completes reviews of eligible faculty and submits report to Dept. Chair, committee chair, and the faculty member (10 business days of receipt of the Committee and/or Dept. Chair final report.)
November 13, 2023 (Typically Second Friday in November*)	February 5, 2024
*PSU closed Friday, November 10. Typical deadline kicks to Monday due to holiday. Dept. Chair completes reviews of eligible faculty and submits Dept. Chair's letter and committee report to the Faculty member (10 business days from receipt of committee report.)	Dept. Chair, committee chair and/or faculty member requests reconsideration conference. (5 business days of receipt of the Dean's Letter.)
November 20, 2023	February 19, 2024
Faculty member requests reconsideration (5 business days from receiving Dept. Chair/committee report)	Faculty member submits supporting materials pertinent to reconsideration of Dean's Letter. (10 business days from notice for Reconsideration.)
December 20, 2023 *	March 8, 2024 (First full week in March)
*PSU Closed November 23 & 24. Member submits supporting materials to committee and/or Dept. Chair (20 business days from the date of the request for reconsideration.)	Dean completes review, issues report to the Dept. Chair and the faculty member and submits Assurance of Review to Provost.

## PCAR Notification for 2024-25 Cycle (Next AY):

May 1, 2024	June 1, 2024
OAA provides a list to the Deans and Chairs for verification of eligible faculty to be reviewed in AY 2023-2024.	All PCAR Eligible Faculty Respond to the PCAR Survey. All Faculty requesting to Defer or Opt-Out have noticed their Dean in writing.
May 15, 2024	June 15, 2024
OAA sends <b>PCAR Survey</b> to all PCAR eligible faculty to respond: Participate/Defer/Opt-Out.	All faculty requesting to Defer or Opt-Out have received notice of Deans Approval or Denial.

## POST-TENURE REVIEW (TT):

Tenured faculty members shall undergo post-tenure review (PTR) every five years after the award of tenure. Successful reviews for promotions in rank of tenured faculty shall be considered as reviews in lieu of post-tenure review and shall re-commence the countdown to the next post-tenure review according to Article IV, page 8 of the <u>University PTR Procedures</u>.

PTR Review Cycle: (Please note: "typically" ha	as been added to accommodate holidays that may bump a business day count.)
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October 6, 2023 (First Friday in October)	January 12, 2024 (Second Friday in January)
Faculty submits PCAR dossier.	Should Committee and/or Dept. Chair reverse their original decisions, they shall write a report of the new decision and forward all materials to the Dean.
October 27, 2023 (No later than Last Friday in October)	January 29, 2024*
Committee completes review of eligible faculty and submits report to Dept. Chair.	*PSU closed Monday, January 15 <sup>th</sup> . Dean completes reviews of eligible faculty and submits report to Dept. Chair, committee chair, and the faculty member (10 business days of receipt of the Committee and/or Dept. Chair final report.)
November 13, 2023 (Typically Second Friday in November*)	February 5, 2024
*PSU closed Friday, November 10. Typical deadline kicks to Monday due to holiday. Dept. Chair completes reviews of eligible faculty and submits Dept. Chair's letter and committee report to the Faculty member (10 business days from receipt of committee report.)	Dept. Chair, committee chair and/or faculty member requests reconsideration conference. (5 business days of receipt of the Dean's Letter.)
November 20, 2023	February 19, 2024
Faculty member requests reconsideration (5 business days from receiving Dept. Chair/committee report)	Faculty member submits supporting materials pertinent to reconsideration of Dean's Letter. (10 business days from notice for Reconsideration.)
December 20, 2023 *	March 8, 2024 (First full week in March)
*PSU Closed November 23 & 24. Member submits supporting materials to committee and/or Dept. Chair (20 business days from the date of the request for reconsideration.)	Dean completes review, issues report to the Dept. Chair and the faculty member and submits Assurance of Review to Provost.

## PTR Notification for 2024-25 Cycle (Next AY):

# Notifications: A list of deadlines for PTR for faculty may be found in Article IV, in the <u>University PTR Procedures</u> (*Revised Spring* 2017).

May 1, 2024	June 1, 2024
OAA provides a list to the Deans and Chairs for verification of eligible faculty to be reviewed in AY 2024-25	All PTR Eligible Faculty Respond to the PTR Survey All Faculty requesting to Defer or Opt-Out have noticed their Dean in writing.
May 15, 2024	June 15, 2024
OAA sends <b>PTR Survey</b> to all PTR eligible faculty to respond: Participate/Defer/Opt-Out.	All faculty requesting to Defer or Opt-Out have received notice of Deans Approval or Denial.

# **ADJUNCT FACULTY REVIEW CYCLES**

Adjunct faculty members who have been employed as adjuncts by PSU for 3 years or 20 credits, whichever occurs first, will be offered a professional evaluation by their Department Chair or Program Manager.

## **Professional Evaluation Notifications and Cycles:**

A faculty member will be notified of their eligibility for a professional evaluation before the end of the term in which they complete the requirements (3 years or 20 credits). This notification will be accompanied by instructions for submission and a template for assessing evaluation materials. Evaluations should be offered and completed during the term immediately following the one in which the faculty member has met the requirements.

The professional evaluation process will be completed either in the following term or no later than the end of the next term in which the faculty member teaches.

If an Adjunct faculty member elects not to have an evaluation at that time, they will be offered another opportunity after they have been employed for an additional (1) year. <u>See Article 8, Section 4, Collective Bargaining Agreement</u>.

Once an Adjunct faculty member has received a successful evaluation, future appointments will be offered for a term of two academic years, subject to the provisions of Article 8, Section *3.4*. <u>Further evaluations may be conducted every four years if initiated by the Chair</u>. EXCEPTION: Current Adjuncts who have been employed by PSU since prior to September 16, 2014, are automatically eligible for a two-year appointment and are not required to complete the professional evaluation process. They may be evaluated every four years if initiated by the Chair. <u>See Article 8, Sections 3.4 and 4.3, Collective Bargaining Agreement.</u>

## Deadlines for Appointments and Assignments, please also consult the **PSUFA Collective Bargaining Agreement**:

- <u>No later than week 6 of Winter Term</u> Departments will email all current adjuncts to inquire about their availability.
- <u>By week 5 of Spring Term</u> Departments will confirm their intent to renew the appointment of adjuncts.
- <u>No later than July 15<sup>th</sup> Details about course assignments and schedule for the coming academic year will be communicated.</u>
- <u>3rd week of August or 5 weeks before the first day of Fall Term</u> adjunct reappointment letters will be issued.

## For more information on the following topics, please consult the **PSUFA Collective Bargaining Agreement**:

- Academic Year and Two-Year Appointment Eligibility Benchmarks: (Article 8, Section 3)
- Determination of Academic Rank: (Article 8, Section 2)
- Letter of Appointment: (Article 8, Section 1)
- Course Cancellations (Article 12, Section 8)
- Position Posting Process (Article 8, Section 3)

# **ACADEMIC PROFESSIONALS (AP) ANNUAL REVIEWS**

Academic professional performance reviews are outlined in <u>Article 17 of the PSU-AAUP Collective Bargaining Agreement</u>. Units may use the Appropriate Unclassified Evaluation form found on the HR website: <u>https://www.pdx.edu/human-resources/policies-contracts-forms#PERMAN</u>.

April 17, 2024 (Third Monday of April)	May 15, 2024 (Third Monday of May)
AP performance reviews are due to the Provost, or other relevant Vice	AP performance reviews are due to Human Resources.
President, Vice Provost, or Dean of each division, school, or college.	

- All Academic Professionals shall have annual performance reviews (evaluations).
- The performance review year will be the preceding 12 months. The Performance Evaluation Form for Academic Professionals must be completed.
- Employees with alternative work arrangements will be evaluated on their performance and output of work regardless of their where they perform their work.
- Academic Professionals who have worked at Portland State University in an Academic Professional position for at least four years at the time of their annual evaluation will be eligible for a salary increase as stated in Article 30, Section 7B.
- Academic Professionals will be eligible for recurring salary increases every four years so long as evaluations are rated satisfactory or above for the four-year period, they will receive the salary increase every 4 years until the maximum salary for job grouping/level is reached.
- Academic Professional Advancement increases will be effective July 1 (for those employed on a 12-month basis) and September 16 (for those employed on a 9-month basis).

#### 2022-23 AY Eligibility 4th year review increase:

## Start date on or before July 1, 2020

July 1, 2020 - May 31, 2021 year 1 review

July 1, 2021 - May 31, 2022 year 2 review

- July 1, 2022 May 31, 2023 year 3 review
- July 1, 2023 May 31, 2024 year 4 review
- July 1, 2024 Increase Effective
- July 1, 2024 start of year 1 of 4

Notice of Appointment Termination for Academic Professional Staff: See Article 17, Section 5, of the PSU-AUUP Collective Bargaining Agreement.

## ACADEMIC ADMINISTRATORS (RANKED/EXCLUDED PERSONNEL) APPOINTMENTS AND REVIEWS

#### Department Chair/Director Selection:

The guidelines for chairperson selection may be found in Article III, Section 4 of the Faculty Governance Guide. The chair/chair-equivalent appointment form and process are located here.

#### **Reviews:**

With the exception of members of the Academic Leadership Team (ALT) reviews of <u>all ranked, excluded</u> personnel, are conducted using the process found under RESOURCES AND PROCESS GUIDANCE at: <u>https://www.pdx.edu/academic-affairs/academic-personnel-policies-and-development#dean-chair-director-resources</u>. This includes Assistant and Associate Deans, Academic Chairs, and Directors.

March 24, 2024 (Fourth Friday in March)	April 26, 2024 (Fourth Friday in April)
Self-evaluations of other ranked excluded personnel are due in the Dean's	ALT members send completed reviews to OAA and HR.
office.	

Annual reviews of <u>unclassified/unrepresented/excluded</u> academic personnel may be conducted using the <u>template found on the</u> <u>HR website https://www.pdx.edu/human-resources/policies-contracts-forms#PERMAN</u> or a process adopted by their units. These reviews are due annually on **April 30.** 

## **Retirement Transition Programs:**

The Retirement Transition Form templates are ready for use and can be found under the "RETIREMENT TRANSITION PROGRAMS" heading in the center column on the <u>OAA Website</u>. Please also consult the appropriate AAUP Retirement Transition MOU (TTF, NTTF, AP) regarding the Retirement Transition Program.

Deadlines for TTF and NTTF Retirement Transition Program:

- Draft Agreements are due to OAA for review no later than May 26.
- Signed Final Agreements are due to OAA no later than June 16.
- All signed agreements are forwarded by OAA to AAUP no later June 30.

The Phased Retirement Transition Program for Academic Professionals provides for a period of **post-retirement** work for the retired Academic Professional at 0.5 FTE for up to 12 months after the Academic Professional's retirement from PSU. AP Phased Retirement Transition Program Deadlines are as follows:

- Employee initiate this process at least three months prior to their expected date of retirement
  - Employee and supervisor discuss the terms of a Phased Retirement Agreement and have that agreement memorialized prior to the expected retirement date.
- The supervisor must respond within 30 calendar days to the Academic Professional's request to participate in the program indicating if PSU intends to grant the member's request. If feasible, the supervisor will then create a proposed Phased Retirement Agreement for the retiring employee's consideration. The retiring employee will be granted an opportunity to give feedback and engage in the dialog in the creation of the Phased Retirement Agreement.
- The Phased Retirement Agreement must also be reviewed and approved by the Vice Provost of Academic Personnel before it is finalized. Draft agreements are due to OAA no later than 30 days prior to date of retirement.
- Signed Final Agreements are due to OAA no later than 15 days prior to date of retirement.
- A copy of the final signed agreement will be forwarded to the Association no later than the last Friday in June of each year of the program

	FALL QUARTER	WINTER QUARTER	SPRING QUARTER	NOTES
1 <sup>st</sup> Year			April 1: Notify faculty member of renewal or non-renewal of annual contract. (NTT) April 1: Conduct 1 <sup>st</sup> annual review for those in year one of their probationary period for continuous appointment. (NTT- CA)	"Faculty on annual tenure must be reviewed after the completion of the first year of their appointment and each subsequent year" (Revised and reapproved June 25, 2018 University Tenure and Promotion Guidelines, page 29-30). (TTF) "Non-tenure track instructional faculty members are to be evaluated annually during years 1 throug 5 of the probationary period" (Article 18, Section 2 of the PSU-AAUP 2015-2019 Collective Bargaining Agreement). (NTTF)
2 <sup>nd</sup> Year	October: Conduct the review of the faculty member's progress. (first review for TT) (NTT) December: Chair shares the review with faculty member. (TT) (NTT)	January 1: Notify faculty member of renewal or non-renewal of annual contract. (NTT)		
3 <sup>rd</sup> Year	October: Conduct the review of the faculty member's progress. (NTT)	January 1: Notify faculty member of renewal or non-renewal of annual contract. (NTT)	April: Chair shares the review with faculty member and sends recommendation to Dean. (TT)	"there must be a review at the end of the third year" (Revised and reapproved June 25, 2018 University Tenure and Promotion Guidelines, page 29-30). (TTF)
Third Year Review (TTF)	December: Chair shares the review with faculty member. (NTT)	February: Faculty file due to department committee for review. (TT) March: Committee recommendation to Chair. (TT)		Information and guidelines on Third Year reviews are provided by your department.
4 <sup>th</sup> Year	October: Conduct the review of the faculty member's progress. (TT) (NTT) December: Chair shares the review with faculty member. (TT) (NTT)	January 1: Notify faculty member of renewal or non-renewal of annual contract. (NTT)		
5 <sup>th</sup> Year	October: Conduct the review of the faculty member's progress. (TT) (NTT) December: Chair shares the review with faculty member. (TT) (NTT)	January 1: Notify faculty member of renewal or non-renewal of annual contract. (NTT)		
6 <sup>th</sup> Year P&T (TT) and Promotion (NTT) Review	October: Conduct the final review of the faculty member (this review determines recommendation for tenure or continuous appointment). (TT) (NTT)	January: See Promotion and Tenure process on page 1. (TT) (NTT)		
	December: See Promotion and Tenure process on page 1. (TT) (NTT)	February: See Promotion and Tenure process on page 1. (TT) (NTT)		