

## Conducting Post-tenure Reviews for Tenured Faculty

Updated August 2020

<b>TIMELINE</b> for Conducting the <b>Post-tenure Reviews</b> :	
Spring	<b>Dean's office</b> notifies Chair and faculty who are eligible for review in the upcoming year by <b>May 1</b> . <b>Eligible faculty</b> , if desired, request deferment from Dean (e.g., based on sabbatical) by <b>June 1</b> .
Early Fall	<b>PRT Chair</b> solicits faculty nominations for specific committee members. Faculty make requests, if desired, by first week of term. <b>Office Specialist</b> reminds faculty who are to be considered that materials are due <b>October 15</b> and that they can submit nominations for committee members to the PRT Chair. <b>PRT Chair</b> assigns subcommittees and set up a schedule for review. <b>Faculty</b> submit materials to Office Specialist and the PRT Chair by <b>October 15</b> .
Late Fall	<b>Subcommittees</b> conduct reviews and write report; send to the Chair. <b>Subcommittees</b> meet with faculty to review reports. <b>Chair</b> writes memos to Dean to accompany faculty reports. If no reconsideration is requested, <b>Office Specialist</b> sends reports and memos to the Dean, copies faculty.
Winter/ Spring	<b>Faculty</b> can request reconsideration to Committee, Chair, Dean, and/or Provost. If faculty request reconsideration, procedures detailed below are followed. If final decision is negative, faculty member and Chair develop a personal development plan.  Upon receipt of notification from OAA, the <b>Chair</b> or reviewed <b>faculty member</b> notify the designated <b>Office Specialist</b> who places final memos in faculty folders.

The Chair and PRT Committee Chair are responsible for ensuring that post-tenure reviews for senior faculty are conducted every five years. The goal of these reviews is to provide opportunities for the professional development of senior faculty and to align each faculty member's career path with the departmental mission. Post-tenure reviews are neither a merit review nor a re-evaluation of tenure or promotion. Post-tenure reviews (PTR – as distinguished from PRT) are carried out by subcommittees.

The Post Tenure Review Process is conducted as follows:

1. Late in Spring quarter, no later than May 1, OAA notifies (via the **Dean**) the Chair and faculty who are eligible for review the next year. By May 1, **faculty** may request a deferment (based, for example, on an upcoming sabbatical or leave).
  - Promotions in rank are considered reviews, and reset the countdown for PTR.
  - Tenured faculty who provide a letter stating they will retire within 2 years can also opt out of post-tenure review.
2. The **Chair** informs the PRT Chair and the Office Specialist who is eligible for PTR next year, and the **Office Specialist** notifies them that their materials are due by October 15.

3. At the beginning of fall quarter the **Office Specialist** obtains the dates that reviews are due to CLAS and again reminds faculty that their materials are due by October 15.
4. The **faculty member** creates a dossier that includes:
  - a. A current **curriculum vitae** (in PSU format);
  - b. A **narrative** of work done since the last review (whether for tenure, promotion, or PTR) in relation to the faculty member's career path;
    - if the career path changed significantly, the faculty member should explain how and why in the narrative;
    - the narrative should highlight the faculty member's quality contributions, succinctly describing the activities that demonstrate continuing professional development and contributions to the life of the university and external communities;
    - the narrative may also include information about changes in work or life circumstances that have affected the faculty member's work during this period;
    - in addition, the narrative includes future plans.
  - c. Documentation of **teaching** accomplishments, including contributions to the undergraduate and undergraduate programs; and results from all course evaluations, summarized graphically;
  - d. Documentation of the faculty member's fair share of **institutional service**.
  - e. Any additional materials the faculty member wishes to submit that are part of the work that he or she feels are relevant for the review.
5. The **PRT Chair** coordinates the work of the PTR subcommittees. A subcommittee, consisting of 3 people, is organized for each faculty member up for review.
  - a. **Committee members** can include tenured or emeritus faculty of Portland State University whose department, discipline, unit or work aligns with the faculty member's career trajectory.
  - b. The **PRT Chair** informs faculty that, by a certain date, they can nominate 2 faculty to serve on their review committee. The faculty member may also request exceptions for consideration and such exceptions shall be considered at the discretion of the department.
  - c. If these names are received by the deadline, the **PRT Chair** accommodates these names as fully as possible. If nominations are not submitted by the deadline, the **PRT Chair** appoints the entire committee.
6. When the **subcommittee** is constituted, its members select a chair who writes the committee's report, addressed to the Department Chair. In its evaluation, the committee should be mindful of changing priorities and weights on teaching, research, outreach, and service that occur at different stages of an academic career. Other factors to be considered include but are not limited to:
  - a. the faculty member's teaching load relative to the customary teaching load and/or added preparation time required for new, different and/or non-lecture forms of instruction or delivery;
  - b. time and support required to transition successfully to new areas of research, teaching, outreach, or service;

- c. increased departmental service, research, and/or instruction loads as a consequence of department staffing issues, such as the ratio of tenured to non-tenured faculty, increasing enrollments, absences of other faculty members due to sabbaticals, personal circumstances, or released time, unfilled vacancies, administrative appointments, changes in instructional support, increasing class sizes and/or changes in the physical workspace in the department;
  - d. personal circumstances such as maternity, paternity, adoption, injuries, illnesses, or other circumstances that have had an impact on the faculty member's work that did not result in a deferral; and
  - e. increased advising or mentoring duties due to departmental changes or to the role the faculty member plays in the campus community
7. The **subcommittee** will find the faculty member's contributions to have met university standards for post-tenure review if:
    - a. the faculty member adequately demonstrates ongoing activity in each of the areas above, or the faculty member adequately demonstrates to the committee how his or her activities are consistent with departmental/unit needs and priorities, and
    - b. the effort expended totals the effort expected of a full time (1.0 full time equivalent) faculty member or prorated commensurate to the faculty member's FTE assignment for those parts of the review period when the faculty member's assignment was less than full time.
  8. The **subcommittee** tries to reach consensus before writing its report. In its report, the committee shall explain its decision and provide evidence to support its decision. If the committee finds the faculty member's contributions to meet the standards set forth for review, they shall document this in their report. If the committee finds the faculty member's contributions do not meet standards, the report shall document the areas the committee finds do not meet standards and provide evidence so that these areas shall be addressed in a Professional Development Plan. Should a unanimous decision not be reached, the committee report shall include the views of the majority and the minority.
  9. The **Department Chair** confirms that the faculty member's PTR Committee has followed departmental and university review guidelines, has considered the faculty member's dossier, and that the committee's report is complete and uses the proper forms.
 

The **Department Chair** writes a memo affirming or challenging the committee's decision and recommendation based on departmental criteria and explain his/her reasons. If the Chair finds the faculty member's contributions do not meet standards, the chair's letter documents the areas he/ she finds do not meet the standards and provides evidence so that these areas can be addressed in a Professional Development Plan.
  10. The **Department Chair** sends their memo and the committee report to the faculty member within 10 working days of receiving the committee's report. The **faculty member** reviews the entire file before it is forwarded to the Dean/Provost, and indicates this by signing the appropriate form.

## Requesting Reconsideration

11. If the **faculty member** disagrees with the recommendation, he/she may request reconsideration. The Department Chair discusses with the faculty member, when requested, the reasons for the recommendations by the review committee and the department chair. **Faculty** can request reconsideration to the Committee, Chair, Dean, and/or Provost (see timeline below).
12. The **Department Chair** provides to the Dean a statement of assurance that all eligible faculty have been reviewed, and the **Office Specialist** submits to the Dean for each faculty member reviewed:
  - A completed recommendation form signed by members of the review committee and Chair;
  - The review committee's report and the Department Chair's memo;
  - If a reconsideration was requested, a copy of the faculty member's request, the materials submitted, and the reconsideration reviews done by the Chair and/or committee.
13. Upon receipt of notification from OAA, the **Chair** or reviewed **faculty** notify the designated **Office Specialist** who places final memos in faculty folders on the I-drive and in the faculty member's personnel file in the Chair's office.

## Procedures for Post-Tenure Review of Department Chair

14. The procedure of evaluating Department Chairs is the same as that for tenured faculty except that the role of the Chair is filled by the Dean. If the immediate supervisor of the individual under review is the Dean, the Dean must designate a person to fulfill the role of the immediate supervisor (e.g. an Associate Dean).

## Post Tenure Review Cycle and Timelines (effective Sept. 16, 2016)

	Due date	Task
1.	May 1	<b>OAA</b> creates a list of eligible faculty and provides to Deans.
2.	No later than June 1 prior to the year of eligibility.	<b>Dean</b> notifies eligible faculty and Chair.
3.	June 15 prior to the year of eligibility.	<b>Faculty</b> requests deferment.
4.	Per Dept. P & T guidelines.	<b>PRT Chair</b> forms department committees.
5.	1st Friday in October.	<b>Faculty</b> submits dossier.
6.	End of October.	<b>Committees</b> complete reviews of eligible faculty and submit report.
7.	Within 10 working days from receipt of committee report. (Mid November)	<b>Chair</b> completes reviews of eligible faculty and submits report.
8.	Within 10 working days of the transmittal of committee report. (Mid November)	<b>Chair</b> sends faculty member Chair's letter and committee report.
9.	Within 10 working days of receipt of recommendation. (Late November)	<b>Faculty</b> member requests reconsideration.
10.	Within 20 working days of request for reconsideration. (Mid December)	<b>Faculty member</b> submits supporting material materials to Committee and/or Chair.
11.	Early January	<b>Committee</b> and/or <b>Chair</b> respond to reconsideration request and forward all materials

		to Dean.
12.	Within 20 working days of the receipt of the committee and chair reports. (Late January)	<b>Dean</b> completes review of eligible faculty and submits report.
13.	Within 10 working days of the receipt of the Dean's letter. (Mid February)	<b>Department Chair, chair of the committee, or faculty member</b> requests reconsideration.
14.	Within 10 working days of request for reconsideration. (Late February)	<b>Faculty member</b> submits supporting materials to committee and/or Chair.
15.	Mid-March.	<b>Dean</b> completes review, issues report and submits to Provost.
16.	Within 10 business days of the receipt of the Provost letter. (Early April)	<b>Faculty member</b> requests reconsideration conference with the Provost.
17.	Within 20 days of receiving Provost letter. (Early May)	<b>Faculty member</b> submits supporting materials to the Provost. <b>Faculty member</b> requests meeting with Provost (optional).
18.	Fourth week of April.	<b>Provost</b> issues decision.
19.	Within 30 business days after Provost's PTR decisions is issued. Early June.*	<b>Faculty member</b> and <b>Chair</b> jointly develop and agree to by PTR professional development plan (PDP)
20.	Within 14 business days. Second week of June.*	If faculty member and chair cannot agree they meet with the <b>Dean</b> .
21.	June 15, year of review.*	<b>Dean, Chair</b> and <b>faculty member</b> meet to develop PDP.
	*May be extended if necessary and approval received.	

Updated by Ellen Skinner & Zoe Erickson, August 26, 2020.