

**Appendix G.1**  
Guidelines for Submitting for Tenured Faculty Review

1. Purpose

- (a) The UW-Extension Tenured Faculty Review and Development Policy was created with the idea that the collegial review should provide an opportunity for long term reflection on the accomplishments, scholarship and aspirations of the faculty member being reviewed. The Department of Family Development review of the tenured faculty serves as a continuation of the evaluation process that initially led to the granting of tenure. (UPG #12) ([www.uwex.edu/secretary/policies/section7/upg12.pdf](http://www.uwex.edu/secretary/policies/section7/upg12.pdf)) The review and methods shall fully respect scholarship and academic freedom.
- (b) The progress and accomplishments of a Department member shall reflect the mission of UW Extension, the mission of the Department of Family Development and the individual's job description.

2. Criteria

The Department member is expected to provide documentation consisting of a concise report of program accomplishments or impacts, a professional development listing, a professional development plan, job description(s) and performance reviews and/or administrative reviews. (See Appendix G.2 for complete details.)

The department member's progress and accomplishments shall be measured on the criteria appropriate for the individual job descriptions and mission of the Department of Family Development since the last promotion or tenured faculty review and will be reflected through their documentation of:

- Evidence of continuing scholarship in:
  - ✓ research,
  - ✓ integration,
  - ✓ outreach/engagement,
  - ✓ teaching and
  - ✓ administrative/leadership of educational and/or research programs. (optional)

(Include a brief description of local situation, including factors that affect it).

- Continuing professional development as demonstrated by:
  - ✓ personal intellectual growth in the acquisition of new job related skills, ideas and experiences,
  - ✓ contributions to the profession,
  - ✓ contributions to the university, including faculty governance,
  - ✓ program development and implementation, and
  - ✓ administrative/leadership of educational and/or research programs. (optional)
- Efforts to reach diverse and/or underserved audiences including programming and professional development.

### 3. Process

- (a) Tenured faculty in the Department of Family Development will be reviewed every five years. A Department member may request a Tenured Faculty Review after two years.
- (b) The Department Chair shall compile a list of all tenured members (in consultation with the Tenured Faculty Review Committee Chair), except those with concurrent appointments, by date of last promotion and forward it to the Tenured Faculty Review Committee Chair.
- (c) A promotion will serve as the date of the last tenured faculty review when promotion materials include a professional development plan for the next five years.
- (d) Department members serving on the Tenured Faculty Review Committee during the year they are scheduled for review will be excused from committee proceedings during the time the committee determines the status of the member's review.
- (e) Department members who have taken a leave of absence may submit a letter requesting a change in review schedule status to the Tenured Faculty Review Committee Chair.
- (f) A Department member may request a one-year postponement of his/her Tenured Faculty Review with a written request to the Tenured Faculty Review Committee Chair by May 1.
- (g) Prior to March 1, the Committee Chair shall notify tenured faculty members to be reviewed and the dates their documents are to be in the hands of the Review Committee. Reviews and appropriate documentation will be completed by August 15. The Department Chair submits summary letters of review by September 1 to affect the next merit raise decision.
- (h) The Tenured Faculty Review Committee shall meet with each tenured member being reviewed. The review will not exceed two hours with the members. The University Committee, on opinion from legal counsel, interprets meetings to include meetings via electronic media. (Faculty Senate, University Committee Report, 2-24-94) Electronic media must be mutually acceptable to the participants. These meetings shall be held at state expense appropriated through the Dean's office.
- (i) The review will consist of information provided by the faculty member including self-initiated performance reviews and/or administrative reviews and should reflect on all faculty work since the faculty member's last review, including administrative responsibilities. Information provided via mail or electronic submission will be accepted.
- (j) The Tenured Faculty Review Committee determines if the faculty member's performance is Successful or Unsuccessful. The Committee Chair shall prepare a written summary for the member, which includes:
  - an overall rating,
  - identified strengths of major program
  - areas for strengthening and
  - professional growth needs

- (k) The Department member being reviewed will receive feedback during the review. A written copy of the summary of the committee findings will be shared with the member within 15 working days from the completion of the Tenured Faculty Reviews and a copy sent to the Department Chair. A Department member has 15 working days to respond in writing to the Department Chair and Tenured Faculty Review Committee Chair upon receiving the summary.
- (l) The Department Chair shall use the written summary as a basis for a consultation with the Dean of Cooperative Extension, who will share it with District Director/Administrative Unit Chair or designee. In the year of a tenured faculty member's review, the results will be the primary basis for merit review. In the years between a tenured faculty member's reviews, the tenured faculty review process shall be considered with annual review information in annual merit process. The results of the most recent tenured review must be considered equally with annual review information in annual merit processes. Tenured faculty reviews completed by September 1 will affect the next merit raise decision.
- (m) The Department Chair shall send the following documents to the Dean by September 1:
  - (1) Names of Department members reviewed for the year
  - (2) A written summary of the tenured faculty review for each Department member who has been reviewed
  - (3) A one page professional development plan for each Department member reviewed
  - (4) Names of Department members who have been identified as performing meritorious work
  - (5) Names of members eligible to be reviewed the next year
- (n) A Department member choosing not to provide a written report of program accomplishments or impacts, a professional development listing, a professional development plan, job description(s) and performance reviews and/or administrative reviews by the time requested by the Tenured Faculty Review Committee, will not be reviewed by the Committee. This absence of review and rationale for it will be communicated to the Dean for administrative action.

4. Open Meeting Law Statement:

The customary procedure will be as follows:

The Department of Family Development has the statutory right to close the meeting and will do so for the purpose of individual reviews. The candidate will be invited in at the review at the beginning of the review to address the six questions noted in Appendix G.2 (2.). The candidate will then be excused while the committee reviews the candidate's written documentation and oral presentation. The candidate will be invited back in to the meeting for the committee to provide a review of the candidate's work.

In addition, the Department of Family Development has the statutory right to invite others into the closed session that may have relevant information to share as well as the right to deviate from this aforementioned practice if certain circumstances dictate an alternative approach.

5. Timeline:

<b>Who</b>	<b>Tasks To Be Done</b>	<b>Deadline</b>
New Committee Members	Join the TFR committee	September 1
Department Chair	In consultation with Tenured Faculty Review Committee Chair distributes names of faculty scheduled for review in the next five year cycle	December 15
Committee Chair	Send faculty members being reviewed the dates for review, the scholarship document and the deadline for sending materials to the TFR committee.	March 1
Department member	May submit a written request to the department chair and Tenured Faculty Review Committee Chair for a one-year postponement of his/her tenured faculty review.	May 1
Department member	Sends report of program accomplishments or impacts, a professional development listing, a professional development plan, job description (s) and performance reviews and/or administrative reviews to committee members.	June 15- Postmark or email documents to committee members
Tenured Faculty Review Committee	Conducts reviews	Mid July
Committee Chair	Sends Tenured Faculty Review Summary Report (Appendix G. 3) to the faculty member and department chair via electronic and surface mail.	15 working days from the completion of the Tenured Faculty Reviews
Department member	Sends a letter of response to the department chair if in disagreement with the rating determined by the TFR committee	15 working days after receiving the Tenured Faculty Review summary
Faculty member	If faculty member perceives unfair treatment in the review process, may utilize the grievance process described in UWEX Chapter 6.02	
Department chair	Shares Tenured Faculty Review Summary Report and professional development plan of each faculty member who has been reviewed with Dean of Cooperative Extension who places documentation in UWEX personal member's institutional file. Written copy is placed in the faculty member's Department of Family Development file.	September 1

6. Professional Development

- (a) The Department member will identify opportunities for and sources of support for continued professional development.
- (b) It is the Department member's responsibility to carry out his/her professional development plan.

7. Remediation Responsibility

- (a) For a member whose review reveals significant developmental needs in performance (Unsuccessful Performance), the respective District Director and department chair shall work with the member and the Dean in determining a mutually agreeable action plan for the next 12 months.

- (b) A tenured faculty member may request a new review two years after the last review by sending a letter to the Department Chair stating rationale for the request. The review shall cover performance for the previous five years.
- (c) If an individual is unable or unwilling to improve performance, the institution may proceed with discipline short of dismissal for cause, under Section UWS 6.01, Wisconsin Administrative Code, or, in extreme instances where the facts warrant it, with dismissal for cause, under UWS 4, Wisconsin Administrative Code.
- (d) Faculty who believe they have been unfairly treated in the tenured faculty review process may grieve the matter through the grievance process described in UW Faculty Policies and Procedures Chapter 6. ([www.uwex.edu/secretary/policies/section7/chapter6.pdf](http://www.uwex.edu/secretary/policies/section7/chapter6.pdf)) This chapter describes a grievance as “a personnel problem involving an employee’s expressed feelings of unfair treatment or dissatisfaction with the aspects of his/her working conditions within the institution which are outside of his/her control.”

## Appendix G.2 Content for Submission

### 1. Content to be Submitted

Department of Family Development members being reviewed shall provide a concise report of program accomplishments or impacts consisting of no more than eight pages, a professional development listing, a professional development plan, job descriptions(s) and performance reviews and/or administrative reviews, written by the member, stating progress on the criteria listed in Appendix G.1, G.2 and G.3 as appropriate to the faculty position. Existing reports may be included within the eight page report. Report contents will include:

Report contents will include:

- Evidence of continuing scholarship in:
  - ✓ research,
  - ✓ integration,
  - ✓ outreach/engagement, and
  - ✓ teaching and
  - ✓ administrative/leadership of educational and/or research programs. (optional)

(Include a brief description of local situation, including factors that affect it).

- Continuing professional development as demonstrated by:
  - ✓ personal intellectual growth in the acquisition of new job related skills, ideas and experiences,
  - ✓ contributions to the profession,
  - ✓ contributions to the university, including faculty governance,
  - ✓ program development and implementation, and
  - ✓ administrative/leadership of educational and/or research programs. (optional)
- Efforts to reach diverse and/or underserved audiences including programming and professional development.
- Evidence of administrative/leadership of educational and/or research programs or co-department or department head contribution (optional). Include contributions made in the department head/co-department head role. Focus on scholarship contributions, related to the administrative role. This may include but is not limited to leadership, political effectiveness which may include communication of the value of the UW-Extension collaborations with county government, education provided to county employees, and opportunities to bring the knowledge base of UW-Extension to county initiatives.
- Please use no smaller than 10-point font and one-inch margins (top, bottom, and sides). Print shall appear on only one side of each page. Ideas should be expressed clearly and effectively using proper grammar and sentence structure.

(a) Attachments to the eight-page summary report to include:

- (1) A proposed plan for professional development which identifies preferred professional development activities for the next five years not to exceed one page. (Send three additional professional development plans to Tenured Faculty Review Committee Chair.)

- (2) Copies of all job description(s) since the last review
- (3) Copies of all performance reviews and/or administrative reviews since last Tenured Faculty Review or promotion, including written feedback from office/unit/administrative leader or any other performance review completed with document being signed and dated.
- (4) A professional development list highlighting study in the past five years or since the last Tenured Faculty Review that relates to program emphasis. Document could be up to two pages in length and in addition to the eight-page summary.
- (5) A copy of the most recent Tenured Faculty Review recommendations. (If last review was a rank change, then this does not apply.)

(b) Do not include additional program or supplemental materials.

## 2. The Tenured Faculty Review Meeting with Department Member

The meeting will be informal and conversational focusing on the documentation provided by the faculty member. Topics for discussion are led by the faculty member for approximately 25 minutes and include:

- (a) Looking back on the last five years, what did you hope to accomplish? (Overview of goals, objectives, etc.)
- (b) What happened as a result of your programming - how have your programming efforts made a difference to audiences in your county/state? (Identify accomplishments, impact; consider teaching, scholarship, and program development, and implementation, applied research, program administration, networks established, collaborative efforts, etc. as appropriate.)
- (c) What challenges did you face and how did you handle them? (What did you learn? What would you do differently?)
- (d) As you look ahead, where do you see your program going? (Future goals, professional development plan.)
- (e) The recommendations made at your last tenured faculty review and what you have done as a result of those recommendations, if applicable.

