

**2007-2008**  
**Faculty Affairs Subcommittee on Position Description/Annual Evaluation Forms**  
**Agenda**

**Meeting #8**

**3:30-4:30 p.m.**  
**Monday, April 14, 2008**  
**Brink Hall Faculty Lounge**  
**Order of Business**

**I. Call to Order.**

**II. Minutes.**

- Minutes of Meeting #7, April 7, 2008

**III. Business.**

- Position Description and Summary Table
- Annual Evaluation
- Civility and Collegiality
- Review and discuss changes to *Faculty-Staff Handbook* (outreach/service)

Attachments:

Minutes #7, April 7, 2008  
Position Description and Annual Evaluation  
UI Civility and Collegiality Policy  
*Faculty-Staff Handbook* proposed changes (sent previously)

University of Idaho  
FACULTY AFFAIRS SUBCOMMITTEE ON POSITION DESCRIPTION/ANNUAL EVALUATION FORMS  
Meeting #7, 3:30 p.m. Monday, April 7, 2008

**Present:** Crawford, Dakins, Force, Houle, Morrison (chair), Murphy, Prather, Thompson;  
**Absent:** Hollenhorst, Fletcher, Stauffer (Boise)

**Call to Order:** The chair called the meeting to order asking the subcommittee to consider its expected outcome given that there were 4 weeks remaining in the semester. The subcommittee came to the conclusion that its work would need to be completed by September for the forms to be in place by 2009. To meet this deadline would require the subcommittee to work over the summer (although it was noted that some members are on 9 month appointments and others who wished they were). It was suggested that we work electronically using Microsoft Groove editing necessary documents and continuing group discussions.

The subcommittee began what at first appeared to be a step backwards with respect to changes to the forms already discussed and agreed upon. The following changes and points were made on the last page of the position description:

1. Examples to reflect the current four categories by changing advising to outreach and extension and adding organizational leadership;
2. Annual percentages for the academic year example be 50%, 35%, 10%, 5%;
3. Annual percentages for the fiscal year example be 15%, 40%, 40% and 5%;
4. Under Authentication eliminate unnecessary language: a) remove the word "incumbent" from 1; b) remove "Approval of" and "evaluation (per FSH 3140 B2)" from 2 and 3; and
5. The narrative language to include summer activity will be discussed with General Counsel by Morrison and Thompson who will then report back to the subcommittee;

The subcommittee then tackled yet another discussion on rounding and the fact that there is no clear definition in the *Faculty-Staff Handbook* (FSH) on how or what numbers are to be rounded. It was agreed that both the department chair and college dean score would remain as stated, allowing for one decimal place, but that the rounding would be: .5 and above round up; .4 and below round down. This led into a discussion of what happens if the unit administrator's score is 3.7 and the dean's score is 3.4, or vice versa? Is there any written policy or guidance as to how this is to be justified? It was discovered that a second signature was missing from the current form as was intended by FSH 3320 A-1 f. below:

". . . if the dean's evaluation and rating is different from that of the unit administrator, a second and subsequent signature by the faculty member, acknowledging receipt of the dean's evaluation and rating, is required. If the faculty member disagrees with the Dean's evaluation and the difference cannot be resolved at the college level, either party may choose to refer the matter to the University Ombuds. If the matter remains unresolved at the college level, the Provost shall be notified of the dissent."

It was agreed to add another faculty signature line to the annual evaluation following the dean's as intended in the above. It was pointed out that the signature for the first signing by the faculty member seemed out of place and should follow the "Summary of Reasons" box, before the Dean's signature. The subcommittee agreed to this change. The subcommittee then recommended that a statement be included, following the dean's signature, that a narrative by the dean be included stating the reasons for any differences in scores in any category than that given by the unit administrator.

The subcommittee then embarked on a lengthy discussion of faculty involvement in interdisciplinary work and the lack of knowledge about the signatures for interdisciplinary/center administrators on both forms. The intent was to be sure faculty involved in interdisciplinary work were not only recognized for their work, but were not penalized in their evaluation process by their home unit which seems to have happened. By including these signatures on the forms, it was felt that any discrepancy on the performance evaluation would lead to discussions between all parties. Force, a department chair acknowledged that she was unaware a signature of interdisciplinary/center administrators was required on the forms for faculty

participating in interdisciplinary activities. It was pointed out by others that these signatures and policy language were recently added (December 2006) thus have only been in use this past year.

Force stated that she strongly supports interdisciplinary activity and receives evaluation letters from the interdisciplinary/center administrators for faculty involved in this activity. She reviews these letters and takes them into consideration as she prepares her evaluation as administrator. She attaches the letters to the evaluation form which is what she believed was this process. Force then acknowledged that it was sad to learn there are other department chairs who do not consider these letters as part of the overall evaluation of the faculty member. She then went on to point out the impracticality, or impossibility, of the intended process. She reflected on the fact that she would need to prepare many additional weeks in advance so that she can send the forms to others for review and signature before meeting with the faculty. The time constraints as they are now are already short and this creates an extra burden on administrators.

The members all agreed that a culture change was needed where interdisciplinary activities were concerned. Although it appears mostly needed at the departmental level, where interdisciplinary work is viewed as a hindrance to the specific department/unit, the university as a whole needs to embrace interdisciplinary activity. It was pointed out that the interdisciplinary programs or centers benefit tremendously from the faculty member. As a result the faculty member receives high evaluation marks from this interdisciplinary activity. However, the faculty member's home unit (where they are to be promoted and tenured) feels they have been slighted by the lack of this particular faculty member's presence and participation in the unit's overall goals, e.g. advising. It was pointed out that the counting of FTE's, graduate student credit hours, is tied to budget allocations and there is no clear way to count interdisciplinary activity. It becomes an impossible balancing act with no clear winner.

It was pointed out that changing culture is always hard, but we have to begin somewhere. The signatures are not as important as is a discussion taking place between all parties involved, one that: 1) supports and embraces interdisciplinary activity, 2) provides a department chair with valuable input from others, and 3) avoids a labor intensive process. It was agreed that the narrative evaluation should include interdisciplinary activity language. Following considerable discussion on how best to initiate a discussion of all parties in the evaluation process, the subcommittee agreed further discussion and acceptance of interdisciplinary activities, university-wide, was needed. At this point it was deemed best to keep the signature lines on both forms to maintain a shared decision process as was the original intent and to encourage discussion between all (faculty, interdisciplinary/center administrator, unit administrator, dean and, if necessary, the ombuds or provost). It was noted that professional development in this area is necessary.

Dakins asked the subcommittee to consider putting in the same language similar to that of position description into the annual evaluation e.g. advancement, interdisciplinary activity, etc. thereby tying these forms together. The subcommittee agreed. Prather pointed out the difference between the two forms with regard to 1 and 2 under Teaching on the annual evaluation when compared to the position description. The subcommittee briefly discussed this issue which ranged from the ability to provide positive feedback to a faculty member with a heavy advising load, who truly cares and spends valuable one on one time with students but his/her teaching evaluations are poor, to that of returning the four categories removed earlier under scholarship. It was agreed that rather than go backwards to 6 or the 9 categories, it was best to go the opposite direction. The subcommittee agreed to simplify the annual evaluation form even further reducing it to four major categories and include only the reference to policy within the FSH. Once the policy was strengthened and definitions were put in place, overall professional development is needed not only for the forms but to enlighten everyone on policy.

The subcommittee adjourned at 5:05 p.m.

Respectfully submitted,

Ann Thompson, Scribe

**UI FACULTY POSITION DESCRIPTION FOR ANNUAL PERFORMANCE REVIEW for 20\_\_**  
**(REVISED 7-08)**

**Date:** \_\_\_\_\_ **Department:** \_\_\_\_\_  
**Name:** \_\_\_\_\_ **Title/Rank:** \_\_\_\_\_  
**Appointment:** Academic Year  Fiscal Year  **Other:** \_\_\_\_\_  
**Tenure Status:** Nontenured  Tenured  **Year Tenured:** \_\_\_\_\_

**TEACHING:**

Semester	Subject	Course #	Section	Course Credits	Credit Responsibility	Course Title
Spring						
Fall						
Summer*						

**1. Instruction** (FSH 1565 A-2; Strategic Action Plan Goal 1):

**a.** Describe additional instructional responsibilities (course redesign; introduction of new delivery methods; involvement in course, program, and university level assessment of student learning outcomes; etc.):

**b.** Provide a statement of your goals and objectives for teaching. Include the following areas, as appropriate: advancement, interdisciplinary activity, professional development and professional service (FSH 1565 ?).

*Est. Instruction Percentage of Responsibility:* Spring: \_\_\_\_\_ Fall: \_\_\_\_\_ Summer: \_\_\_\_\_

**2. Advising and/or Mentoring Students** (FSH 1565 A-5; Strategic Action Plan Goal 1):

Advisees (#): Undergraduate (Approx.): Major \_\_\_ Minor \_\_\_ Certificates \_\_\_  
 Grad (Major Professor): Doctoral \_\_\_ Masters Thesis \_\_\_ Masters Non-Thesis \_\_\_

Mentees (#): Graduate \_\_\_ Undergraduate \_\_\_

**a.** Other Service to Students (organization/program advisers, masters/doctoral committees as opposed to major professor, etc.):

**b.** Provide a statement of your goals and objectives for advising and/or mentoring. Include the following areas, as appropriate: advancement, interdisciplinary activity, professional development and professional service (FSH 1565 ?).

*Est. Advising and/or Mentoring Percentage of Responsibility:* Spring: \_\_\_\_\_ Fall: \_\_\_\_\_ Summer: \_\_\_\_\_

**Total Teaching Percentage of Responsibility:**

**Spring:** \_\_\_\_\_ **Fall:** \_\_\_\_\_ **Summer:** \_\_\_\_\_  
 (carry forward to summary table)

**SCHOLARSHIP AND CREATIVE ACTIVITIES** (FSH 1565 A-4 & A-10; Strategic Action Plan Goal 2): [Include Teaching/Learning (FSH 1565 A-3-a), Artistic Creativity (FSH 1565 A-3-b), Discovery (FSH 1565 A-3-c), Integration (FSH 1565 A-3-d), and Application and Engagement Activities (FSH 1565 A-3-e)]

Provide a statement of your goals and objectives for scholarship and creative activities. Include the following areas, as appropriate: advancement, interdisciplinary activity, professional development and professional service (FSH 1565 ?).

**Est. Percentage of Responsibility:**

**Spring:** \_\_\_\_\_ **Fall:** \_\_\_\_\_ **Summer:** \_\_\_\_\_  
(carry forward to summary table)

**OUTREACH AND EXTENSION** (FSH 1565 A-3-e & A-7, Strategic Action Plan Goal 3):

Provide a statement of your goals and objectives for outreach and extension. Include the following areas, as appropriate: advancement, interdisciplinary activity, professional development and professional service (FSH 1565 ?).

**Est. Percentage of Responsibility:**

**Spring:** \_\_\_\_\_ **Fall:** \_\_\_\_\_ **Summer:** \_\_\_\_\_  
(carry forward to summary table)

**ORGANIZATIONAL LEADERSHIP:**

**1. University Service** (See FSH 1565 A-6):

Provide a statement of your goals and objectives for university service. Include the following areas, as appropriate: advancement, interdisciplinary activity, professional development and professional service (FSH 1565 ?).

*Est. University Service Percentage of Responsibility:* **Spring:** \_\_\_\_\_ **Fall:** \_\_\_\_\_ **Summer:** \_\_\_\_\_

**2. Administration** (See FSH 1565 A-8 & A-9):

Provide a statement of your goals and objectives for administration. Include the following areas, as appropriate: advancement, interdisciplinary activity, professional development and professional service\*.

*Est. Administration Percentage of Responsibility:* **Spring:** \_\_\_\_\_ **Fall:** \_\_\_\_\_ **Summer:** \_\_\_\_\_

**Total Organizational Leadership Percentage Responsibility:** **Spring:** \_\_\_\_\_ **Fall:** \_\_\_\_\_ **Summer:** \_\_\_\_\_  
(carry forward to summary table)

Percentage of Responsibility Summary				
Area	Planned Percentage Allocation			
	Spring	Fall	Summer*	Annual
Teaching				
Scholarship and Creative Activities				
Outreach & Extension				
Organizational Leadership				
<b>Total</b>	(All must equal 100%)			

\*Summer column should only be completed by faculty members who have a twelve month, fiscal year appointment. Academic year appointments (this includes all appointments less than 12 months) may include a narrative with respect to their plans for additional activities undertaken in the summer that are outside their position description. (see examples below).

Example Academic Year:	Spring	Fall	Annual
Teaching	40% (x.5)	60% (x.5)	= 50%
Scholarship/Creative Act.	45% (x.5)	25% (x.5)	= 35%
Outreach & Extension	10% (x.5)	10% (x.5)	= 10%
Organizational Leadership	5% (x.5)	5% (x.5)	= 5%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

*Example Fiscal Year:	Spring	Fall	Summer	Annual
Teaching	20% (x.375)	14% (x.375)	9% (x.25)	= 15%
Scholarship/Creative Act.	42% (x.375)	40% (x.375)	37% (x.25)	= 40%
Outreach & Extension	23% (x.375)	33% (x.375)	44% (x.25)	= 32%
Organizational Leadership	15% (x.375)	13% (x.375)	10% (x.25)	= 13%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### AUTHENTICATION

1. Faculty Member: I agree that this is a reasonable definition of my responsibilities to the University of Idaho for the forthcoming calendar year.

\_\_\_\_\_  
Signature of Faculty Member

2. Unit Administrator(s) (including interdisciplinary/center administrator(s) or faculty with joint appointments when appropriate): I agree that this position description is a reasonable reflection of the stated expectations for progress towards tenure, promotion and/or continued satisfactory performance.

\_\_\_\_\_  
Unit Administrator

\_\_\_\_\_  
Unit Administrator (joint appointments if applicable)

\_\_\_\_\_  
Interdisciplinary/Center Administrator (when appropriate)

\_\_\_\_\_  
Interdisciplinary/Center Administrator (when appropriate)

3. College Dean: I agree that this position description is a reasonable reflection of the stated expectations for progress towards tenure, promotion and/or continued satisfactory performance.

\_\_\_\_\_  
Signature of Dean



Dear University of Idaho Community:

Mirroring national trends, demographic changes in the state continue to be reflected in the general student population, administration, and staff at the University of Idaho. The convergence of people of differing races, gender identities, nationalities, ability, and socio-economic groups naturally bring with them enrichment as well as difference in ideology and lifestyles.

One fundamental rationale for the existence of a university is to explore new ideas, and sometimes the exploration challenges intellectual and social beliefs that can lead to tension. The University family continues to demonstrate a good faith effort toward discovering and exploring new ideas through the personal resolve of individuals, recruitment and retention strategies, diversity training opportunities, student programs and events, in addition to community outreach. Because of these efforts and others, the university will continue to be steadfast in protecting free speech and civil liberties.

Despite these efforts, there have been incidents of written statements placed on University property in addition to the use of symbols to convey hateful and threatening sentiments aimed at African-Americans, Latinos, Asians, Muslims, Jews, and individuals with differing sexual orientations. Such expressions of hate and intolerance meant to discriminate against entire groups are beneath the ideals that we aspire to at the University of Idaho. When these incidents are identified, they are evaluated and investigated by the University Risk Manager and police.

We call upon all members of the University Community to reinforce and strengthen the best values of the University of Idaho by speaking against expressions of bigotry and to act with civility when interacting with all of the members of our community.

**Andreen A. Neukranz-Butler, MSW**  
Human Rights Compliance Officer  
338 Administration  
[humanrights@uidaho.ed](mailto:humanrights@uidaho.ed)

If you know of anyone who has been a victim of sexual violence and harassment, gender or racial bias, disability or any other form of discrimination, please contact the:

- U of I Human Rights Compliance Office.....(208) 885-4213, Fax: 885-9201
- Community / Campus Bias Hotline.....(332-BIAS) (332-2427)
- UI Police.....911 or 882-COPS (882-2677)
- Counseling and Testing Center.....885-6716  
Brian Hopper, Psy.D., [brianhop@uidaho.edu](mailto:brianhop@uidaho.edu)
- Dean of Students Office.....885-6757
- Disability Support Services.....885-7200
- International Programs Office.....885-8984
- Office of Multicultural Affairs.....885-7716
- Ombuds Office.....885-6151
- Women’s Center.....885-6616

(FSH 3320)

ANNUAL PERFORMANCE EVALUATION FORM 1: EVALUATION OF FACULTY  
(INCLUDES DISCLOSURE OF CONFLICTS FSH 6240)  
(Confidential)

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Department(s): \_\_\_\_\_

Evaluator(s): \_\_\_\_\_

**NOTE:** Faculty and administrator(s) are to review and address the objectives as stated on the previous year's position description.

Position Description (PD) Responsibilities	PD %	Numeric Score*	PD% x score = total	COMMENTS INCLUDING ACCOMPLISHMENTS and IMPACTS WHEN APPLICABLE (Use back if necessary)
<b>TEACHING</b> (FSH 1565 A-2, A-5; Strategic Action Plan Goal 1)				
<b>SCHOLARSHIP and CREATIVE ACTIVITIES</b> (FSH 1565 A-3,A-4,A-10; Strategic Action Plan Goal 2)				
<b>OUTREACH and EXTENSION</b> (FSH 1565 A-3-e,A-7, Strategic Action Plan Goal 3)				
<b>ORGANIZATIONAL LEADERSHIP</b> (FSH 1565 A-6, A-8, A-9)				

**\*Scoring Key**

- 5 = Exceptional performance
- 4 = Above expectations
- 3 = Meets expectations
- 2 = Below expectations
- 1 = Unacceptable performance

**Scoring Example:**

PD%	Numeric Score	Total
Teaching 50%	4	.50 x 4 = 2.0
Scholarship 35%	2	.35 x 2 = .7
Outreach & Extension 10%	3	.10 x 3 = .3
Org. Leadership 5%	3	.05 x 3 = .15
Dept. Chair Score (transfer total to box below)		3.15 = 3.2
<b>Rounding:</b> .5 and above round up; .4 and below round down.		

**Department & College Score**

May reflect a weighting—not necessarily a mathematical average—of the numerical scores by the appropriate position description percentages. The weighted, department and college scores, may extend one decimal place.

<b>Department Chair Score</b>
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<b>College Dean Score</b>
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(Continued on next page)

**Narrative Evaluation:** A narrative on progress towards tenure, promotion, and/or continued satisfactory performance is to be completed by all evaluators for all faculty using separate pages and attach to this form. Include the following areas, as appropriate: advancement, interdisciplinary activity, professional development and professional service (FSH 1565 ?). **If the narrative(s) is/are not attached the form will be returned by the college.**

\_\_\_\_\_  
Unit Administrator Signature

\_\_\_\_\_  
Unit Administrator (joint appointments if applicable)

Attached signed narrative

\_\_\_\_\_  
Interdisciplinary/Center Administrator (when appropriate)

Attached signed narrative

\_\_\_\_\_  
Interdisciplinary/Center Administrator (when appropriate)

Faculty Comments:

\_\_\_\_\_  
Faculty Signature

\_\_\_\_\_  
Dean Signature

**Narrative: If there are any differences in any category in scoring between the department chair and college dean, a narrative shall be attached stating the reasons for these differences. If the narrative is not attached the form will be returned by the provost.**

\_\_\_\_\_  
Faculty Signature (FSH 3320 A-1 f.)

### FSH 6240 Required Disclosure of Conflicts

**You must complete this disclosure annually with your performance evaluation. If you have a conflict to disclose then you also will need to complete Form FSH 6240A.** Likewise, if there is any change in your circumstance that may give rise to potential conflicts or eliminate potential conflicts previously disclosed, then you will need to complete Form FSH 6240A within 30 days of the change. University of Idaho FSH Policy 6240 Conflicts of Interest or Commitment is available at <http://www.webs.uidaho.edu/fsh/6240.html>. If you have any questions about the form or about specific potential or actual conflicts of interest, please contact your unit administrator or the Chair of the university's Ethical Guidance and Oversight Committee. **Disclose outside employment for compensation of more than 20 hours/week by completing FORM 6240 B – Disclosure of Outside Employment or Consulting for Compensation.**

- I have reviewed FSH 6240 and **DO NOT** have any conflicts of interest, conflicts of commitment or apparent conflicts to report. Please sign and date below.
- I have reviewed FSH 6240 and **DO** have conflicts of interest, conflicts of commitment or apparent conflicts to report. Please, sign below, and fill out form FSH 6240A. Submit completed FSH 6240A to your unit administrator along with separate pages describing a plan to manage each conflict or apparent conflict.

*Your signature below certifies that you have reviewed FSH 6240 regarding disclosure of conflicts, and that the information that you provide regarding disclosure of any conflict is accurate to the best of your knowledge as of the date of this document, and you commit to providing an update if a material change occurs in the information you have provided.*

\_\_\_\_\_  
Faculty Signature