Performance: Annual FT Faculty Review Manager/Employee

New full-time faculty who start on or after May 1, 2023 will not have an annual review, only a 90-day review for 2022-2023. Temp full-time (TFT) faculty who taught for one long semester will not have an annual review. TFT faculty who taught both long semesters will have performance reviews without the goal review and goal-setting sections.

PREWORK TO BE COMPLETED BEFORE SELF-ASSESSMENT

EMPLOYEE: VERIFY 2022-2023 GOALS ARE ACCURATE

Before beginning the self-assessment, please ensure goals for 2022-2023 are in Workday. *Please refer to the goal verification job aid available in the Workday Resource Center.* If you do not have goals for 2022-2023 because you were not full-time faculty with Collin College, you will omit this step. If you had a 90-day review in Workday and set goals, these should appear in your self-assessment.

EMPLOYEE: ACCESS PRIOR YEARS' REVIEWS

Before beginning the self-assessment, you may want to refer back to last year's performance review. *Please refer to the appropriate job aids available in the Workday Resource Center to access reviews from prior years.*
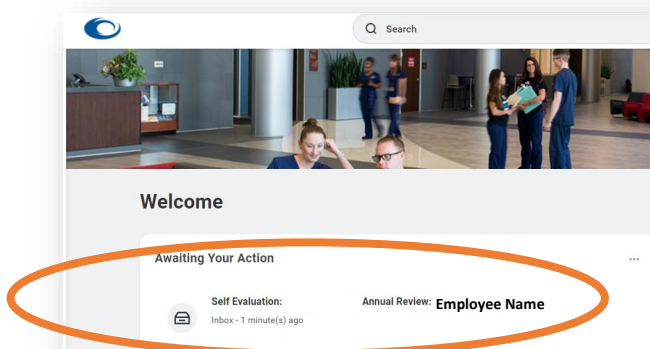
ANNUAL FULL-TIME FACULTY REVIEW: EMPLOYEE SELF-ASSESSMENT

EMPLOYEE: COMPLETE SELF-ASSESSMENT

Launch Workday from Collin.onelogin.com or CougarWeb > My Workplace.

From the Workday **Home/Welcome** page:

1. Launch the self-assessment under **Awaiting Your Action**. Do not be concerned about the due date listed in Workday. Please follow the due date for the self-assessment identified by your associate dean/director.

2. Review instructions for completing the self-assessment. Click **Get Started**.

3. Review the Council on Excellence criteria for teaching, essential performance factors, and competencies. Assess your teaching performance by entering **Employee Summary Comments** in the provided text box. Click **Next**.

Teaching

The Council on Excellence Criteria for Teaching

The primary areas of focus for an excellent faculty member include teaching (the first priority), supporting students, engaging in significant college service, and participating in substantive professional development opportunities.

A Collin College faculty member

- Facilitates learning
- Conveys the fundamental body of knowledge in the discipline and how to apply that knowledge
- Teaches students how to critique, analyze, and build upon that body of knowledge
- Shows students how to apply concepts and provide evidence to demonstrate that knowledge
- Employs current materials, applies contemporary research, and uses effective methods of instruction
- Provides meaningful feedback to students in an effective and timely evaluation process

ESSENTIAL PERFORMANCE FACTORS

Teaching is the central responsibility of faculty members and the most important area of faculty evaluation. While standards may vary somewhat by discipline, certain characteristics of teaching are valued across the College: well planned, carefully organized courses; effective delivery of material; clear student learning outcome expectations; innovation in subject matter and pedagogy; courses that meet program and Collin College objectives; sufficient opportunity for out-of-class contact between instructor and students; demonstrated effort to keep course content current; use of appropriate methods of feedback and student assessment.

Scholarly work and accomplishments in instructional activities may take on a variety of forms, including guiding independent learning activities and student creative performance, interdepartmental collaboration with colleagues, and development and improvement of curriculum.

In the space below, enter either a concise narrative statement or a bulleted list that provides your associate dean or director with adequate information to assist in assessing your accomplishments in teaching during the past year.

7 Items

Competency
Facilitates learning through effective preparation and organization of course information
Provides students with the fundamental body of knowledge of his/her discipline and remains current in effective methods of instruction
Teaches students to apply knowledge and develop deeper understanding
Provides clear student learning outcome expectations
Employs current materials in classroom presentations and learning experiences
Uses teaching and learning methods that are appropriate for the discipline
Employs effective evaluation techniques and provides meaningful feedback to students

Employee Summary

Comment * [Format ∨ | B I U A ∨ | ⬛ | ✎]

[Back] [**Next**] [Save for Later] [Close]

4. Review the Council on Excellence criteria for advising and supporting students, essential performance factors, and competencies. Assess your performance by entering **Employee Summary Comments** in the provided text box. Click **Next**.

Advising and Supporting Students

The Council on Excellence Criteria for Faculty Engagement in Student Advising
A Collin College faculty member

- Provides advice to students about career and curriculum options
- Directs students to competent help for academic and non-academic problems, i.e., Tutoring, Writing Center, ACCESS, Counseling Center, etc.
- Supports student organizations and events
- Is available to and approachable by students and may provide letters of recommendation in support of student success or education/career objectives

Please Note: Not every bulleted item above may apply for every faculty member. In some cases there may be different or additional items that are unique to the faculty member's discipline or academic department.

ESSENTIAL PERFORMANCE FACTORS

The most important responsibility of individual faculty is to enhance the student learning experience. Successful support of students encompasses approachability and availability to assist students inside and outside of the class; advertising and maintaining office hours; being informed about the degree, certificate, and transfer requirements of programs within the discipline; and being knowledgeable, able to explain, and willing to refer to academic and non-academic college resources.

In the space below, enter either a concise narrative statement or a bulleted list that provides your associate dean or director with adequate information to assist them in assessing your level of engagement in advising and supporting students during the past year. Be sure to include any student-related activities that demonstrate your support of students outside of the classroom. Examples include participation in student organizations as well as attending sports events, PTK induction, student performances, receptions, etc. Some items may be duplicated in the College Service category.

4 items

Competency
Understands current career and curriculum options, degree requirements and course transfer information within the discipline and provides timely and tailored advice to students
Helps students with education-based problems and/or directs students to appropriate college resources
Assists students in using appropriate college and community resources for non-educational problems
Is available to and approachable by students

Employee Summary

Comment *

workday. | EDUCATION

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5. Review the Council on Excellence criteria for professional development, essential performance factors, and competencies. Assess your performance by entering **Employee Summary Comments** in the provided text box. Click **Next**.

Professional Development

The Council on Excellence Criteria for Professional Development

A Collin College faculty member

- Remains current and competent in the discipline, staying vigilant and continuously monitoring advances in related scholarship.
- Creates and sustains an on-going program of self-development and improved pedagogy
- Seeks opportunities for any of the following:
- Professional growth formal research and publication, production in one's art, professional performance, etc
- Presentations before professional societies or other meetings
- Workshop and conference participation
- Active involvement in professional associations or community organizations
- Academic career advancement through course work

ESSENTIAL PERFORMANCE FACTORS

Each faculty member is expected to be intellectually active. Professional development may take many forms (see below), including active engagement in intellectual activities within one's own discipline, demonstrating efforts to stay current in one's field.

The following are types of activities that should be included:

- Conferences/workshops attended/conducted
- Professional presentations, papers presented/published/submitted for publication
- Scholarly research or professional creativity
- Collaborating on research projects with students
- Interdisciplinary work with colleagues
- Development of research and collaboration with other professionals
- Active involvement in professional organizations
- Developing and conducting artistic performances
- Coursework recently completed or in progress
- Any other ways in which you remain current in your discipline

Enter either a concise narrative statement or a bulleted list that provides your associate dean or director with adequate information to assist them in assessing your level of engagement in professional development activities during the past year.

Please Note: For conferences or workshops, in addition to their title(s), please include a brief description of their benefit to your teaching or professional activities at Collin. You may also choose to attach a copy of any travel summaries submitted for COE in the Supporting Documents section.

4 items

Competency
Remains current and competent in the appropriate academic discipline
Regularly participates in external professional meetings, seminars, activities, or conferences that are related to one's discipline, and/or activities that help to support teaching and program development
Regularly participates in Faculty Development meetings, activities, or programs offered by the District
Engages in [...] to enhance and promote excellence in teaching that could include any [...] instructional technology; pedagogy; presentation skills; classroom management, etc.

Employee Summary

Comment * | Format | B I U A | ⌄ | ≣ | 🔗

6. Review the Council on Excellence criteria for college service, essential performance factors, and competencies. Assess your performance by entering **Employee Summary Comments** in the provided text box. Click **Next**.

College Service

The Council on Excellence Criteria for College (Community) Service
A Collin College faculty member

- Actively and productively participates in college-wide, division, and department councils, task forces, and committees
- Creates programs/activities for the district that benefit students
- Performs other service activities designed to further the accomplishment of the college's mission
- Represents the college in the community serviced by the college district
- Engages in professionally-related community service

ESSENTIAL PERFORMANCE FACTORS

Faculty members should be actively engaged in service at either the program, department, division, or college level, or a combination thereof. College service provides opportunities for faculty to exercise a leadership role and assist the College in attaining its institutional strategic goals and mission. Characteristics of excellent service include dependability, thoughtfulness, active participation and preparedness regarding committee assignments; acceptance of responsibility and leadership roles; helping professional organizations meet goals; helping student organizations meet goals; and providing opportunities for students to interact with communities beyond the College.

Enter either a concise narrative statement or a bulleted list that provides your associate dean or director with adequate information to assist them in assessing your level of engagement in college service activities during the past year. Include detailed information about the type of service and your role, with title (if applicable) as well as listing achievements and contributions as a result of the service provided.

Please Note: When listing activities, do not include contract activities that are expected of all faculty members such as attending All College Day, graduation, or division meetings, etc.

1 Item

Competency	Description
Works individually and/or collaboratively with college employees to accomplish discipline, divisional and college missions, goals and objectives, through service and participation in any of the following:	• Collegewide task forces • Faculty and staff search committees • Advisory groups • Student groups • Faculty advisor • Professionally related community activities on behalf of the college • Organizing, supporting, or helping to plan/execute special events or college outreach

Employee Summary

Comment * | Format ∨ | B I U A ∨ | ☰ | ✎

7. Do not add any comments under **Professionalism**. This section is for your associate dean/director's comments only. Click **Next**.

8. Provide comments regarding student evaluations.

9. Evaluate the completion of goals for the appraisal period (2022-2023). Click **Rating** or the **Pencil** icon to reveal the drop-down menu to indicate goal completion under **Employee Evaluation**. You may also add comments. When finished, click **Next**.

IMPORTANT
Before this section can be successfully completed, you must verify that your 2022-2023 goals are in Workday. Please refer to the goal verification job aid for instructions on this process.

If you are new to Collin and completed your 90-day review in Workday and set goals for 2022-2023, your goals should appear here. If you were temp full-time faculty for 2022-2023, you will not have goals. If you did not have goals for 2022-2023, this section will remain blank.

Do not edit 2022-2023 goal information on this page. If you do, you will receive an error when trying to submit your self-assessment. *Any goal changes must be approved by your associate dean/director and completed using the **Goals** menu under your profile. Please refer to the goal verification job aid for further instructions.*
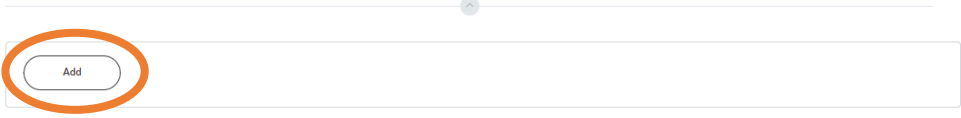
Please follow these steps to evaluate the completion of your 2022-2023 goals:

- Please click **Add**.
- Click **Add Existing**, then **By Review**.
- Select your **2021-2022 Faculty Annual Review.**
- Select and pull in the first **goal set for this year**.
- Select the appropriate goal completion rating and add supporting comments if needed.
- Repeat the above steps until all 2022-2023 goals are added and evaluated.

Goal Review

Please select "Add Existing" and select your 2021-2022 performance review to select and pull in your 2022-2023 goals set in the 2021-2022 reviews. *This process must be completed for each goal.*
Select the appropriate goal completion rating and add supporting comments if needed.

NOTE: Leave this section blank if you do not have goals for this appraisal period.

Add

Goal Review ⌄

Please review goals for this performance review period. Select appropriate ratings and add supporting comments.

NOTE: If the employee does not have goals for the performance review period, this section will be blank.

Goal *
Goal summary here

Description
Goal details here

Category

Due Date

Status

Employee Evaluation

Rating *

Comment

Goal *
Format   B I U A ⌄ ☰ 🔗

Goal summary here

Description
Format   B I U A ⌄ ☰ 🔗

Goal details here

Category

Due Date

Status
Partially Complete   ▼

Employee Evaluation

Rating *
select one   ▼

| select one |
| COMPLETED |
| PARTIALLY COMPLETED |
| NOT COMPLETED |

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10. On the **Goal Setting** page, you will set goals to be completed in 2023-2024. Click **Add** to insert the goal information. Make sure you select an appropriate **Faculty** goal **Category** and identify a **Due Date** in 2023-2024. *Failure to do so will result in an error when attempting to submit your self-assessment.*

Repeat this process until there are three or more goals for 2023-2024. When finished, click **Next**.

If you will be setting goals with your associate dean/director during your performance evaluation meeting, you may skip this section.

Goal *

Enter SMART goal here.

Description

Additional details and information go here.

Category | Select the appropriate faculty goal category.

Due Date | Select an appropriate due date in 2023-2024.

Status | Do not include a status.

☐ Faculty - Professional Development
☐ Faculty - Service
☐ Faculty - Teaching
☐ Staff - Department Initiative
☐ Staff - Identifies with Collin College Core values
☐ Staff - Job Specific Goal

Search

11. Follow the provided instructions to obtain the **Teaching Schedule** template**.**
Once filled out, attach here, along with any other documents. Click **Next**.

Attach Teaching Schedule and Supporting Documents

INSTRUCTIONS FOR FACULTY

Step 1: Please use the **Teaching Schedule** template available on the HR Performance Management page.

Step 2: Save the completed template to your local drive.

Step 3: Attach the completed **Teaching Schedule** document to this review.

Step 4: Attach any additional documents to the review, if needed.

INSTRUCTIONS FOR ASSOCIATE DEANS/DIRECTORS

Step 1: Click on the **Teaching Schedule** and other documents to view.

Step 2: Attach any additional documents, if needed.

⌄

Employee

Drop files here

or

Select files

workday. | EDUCATION

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12. Verify that you have attached the teaching schedule to your self-assessment by selecting the appropriate response from the drop-down menu. Click **Next**.

13. Carefully review all responses and make any needed changes. Click **Save for Later** to save and return to submit at a later time. Click **Submit** to route the appraisal to your associate dean/director. **Please review Step 14 regarding errors, alerts, and confirmation of submission.**

    *You cannot make changes once you click **Submit**. It is recommended that you finish the self-assessment and take a couple of days to reflect before submitting, if time permits.*

14. If you receive an **Error** when attempting to submit, you must make corrections and click **Submit** again. To see error details, click the **Error** hyperlink in the red box. You may have to scroll up or down to see this box.

If you receive an **Alert**, you may make the change or not, depending on applicability. (For example, you may receive an alert that you have created fewer than three goals for 2023-2024. Not having three goals set may be appropriate if you and your associate dean/director set goals together during the appraisal meeting.) You will have to click **Submit** again to ensure your review is submitted.
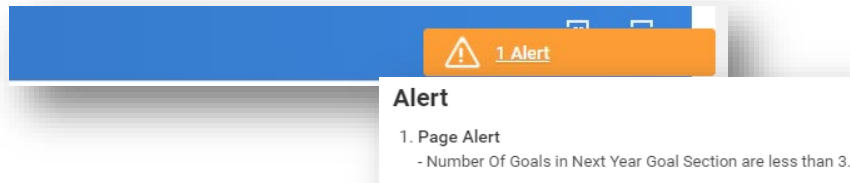
Your review has been submitted when you see the dialog box indicating success. If you do not see this box, your review is not yet submitted.
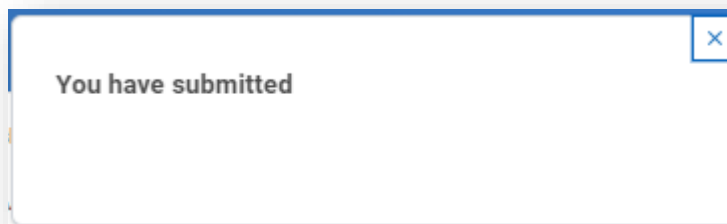
If your review is still in your **Action Items/Workday Inbox**, you have not successfully submitted.

ANNUAL FULL-TIME FACULTY REVIEW: MANAGER'S EVALUATION

MANAGER: REVIEW EMPLOYEE SELF-ASSESSMENT

Launch Workday from Collin.onelogin.com or CougarWeb > My Workplace.

From the Workday **Home/Welcome** page:

1. Launch the appraisal under **Awaiting Your Action**. <mark>Do not be concerned about the due date listed in Workday. The overall appraisal due date is August 31, 2023. It is critical that the manager's review is completed with enough time to meet with the employee and obtain acknowledgements in Workday by August 31, 2023.</mark>
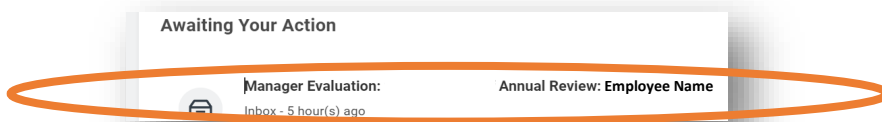
2. Review instructions for completing the appraisal. Click **Get Started**.

3. Indicate if the employee has had any disciplinary actions during the appraisal period.

4. Select the appropriate **Proficiency Rating** (Meets the Expected Level of Performance or Improvement Needed) for each **Competency** within **Teaching**. Review the **Employee Summary Comments** (bottom right). Add required **Manager Summary** comments to justify proficiency ratings (bottom left). Click **Next**.

IMPORTANT

You may send back the self-assessment if an employee has not provided adequate comments, has provided comments for professionalism (an area for manager's comments only), or has any issues related to goal evaluation and goal setting. Navigate to the end of the appraisal and click **Send Back**.

5. Select the appropriate **Proficiency Rating** (Meets the Expected Level of Performance or Improvement Needed) for each **Competency** within **Advising and Supporting Students**. Review the **Employee Summary Comments** (bottom right). Add required **Manager Summary** comments to justify proficiency ratings (bottom left). Click **Next**.

6. Select the appropriate **Proficiency Rating** (Meets the Expected Level of Performance or Improvement Needed) for each **Competency** within **Professional Development**. Review the **Employee Summary Comments** (bottom right). Add required **Manager Summary** comments to justify proficiency ratings (bottom left). Click **Next**.

7. Select the appropriate **Proficiency Rating** (Meets the Expected Level of Performance or Improvement Needed) for each **Competency** within **College Service**. Review the **Employee Summary Comments** (bottom right). Add required **Manager Summary** comments to justify proficiency ratings (bottom left). Click **Next**.

8. Select the appropriate **Proficiency Rating** (Meets the Expected Level of Performance or Improvement Needed) for each **Competency** within **Professionalism**. The faculty member should not have provided **Employee Summary Comments** (bottom right). Add required **Manager Summary** comments to justify proficiency ratings (bottom right). Click **Next**.

9. Review the faculty member's **Employee Summary Comments** regarding student evaluations. **Do not provide comments on this page.** You will provide comments on the following page. Click **Next**.

10. Review student evaluations. Identify **Strengths** (required), **Areas for Development** (required), and **Areas of Special Concern** (if applicable). Click **Next**.

11. Evaluate the completion of goals for the appraisal period (2022-2023). Click **Rating** or the **Pencil** icon to reveal the drop-down menu to indicate goal completion under **Manager Evaluation**. You may also add comments. When finished, click **Next**.

If the employee is new to Collin and completed the 90-day review in Workday and set goals for 2022-2023, these goals should appear here. If the employee did not have goals for 2022-2023, this section will remain blank. Goal review is not required for temp full-time faculty.

If an employee has 2022-2023 goals, but they do not appear here for rating, please contact professionaldevelopment@collin.edu before continuing.

Do not edit 2022-2023 goal information on this page. If you do, you will receive an error when trying to submit the appraisal. *Please refer to the goal transfer job aid for further instructions.*

12. On the **Goal Setting** page, review the 2023-2024 goals set by the employee. You may edit these goals or add goals. Click **Add** to insert a new goal. Make sure you select an appropriate **Faculty** goal **Category** and identify a **Due Date** in 2023-2024. *Please ensure to update any incorrect goal categories.*

Repeat this process until there are three or more goals for 2023-2024. When finished, click **Next**.

13. Ensure the faculty member has attached the **Teaching Schedule** document. If not, you can add it here or send the self-assessment back for the faculty member to add and resubmit. Click the document icon to open and view attachments.

Attach Teaching Schedule and Supporting Documents

INSTRUCTIONS FOR FACULTY

Step 1: Please use the **Teaching Schedule** template available on the <u>HR Performance Management page</u>.

Step 2: Save the completed template to your local drive.

Step 3: Attach the completed **Teaching Schedule** document to this review.

Step 4: Attach any additional documents to the review, if needed.

INSTRUCTIONS FOR ASSOCIATE DEANS/DIRECTORS

Step 1: Click on the **Teaching Schedule** and other documents to view.

Step 2: Attach any additional documents, if needed.

Manager

Drop files here

or

Select files

Employee

Teaching Schedule \
Uploaded by

Upload Date

Comment

14. Verify the teaching schedule has been attached by selecting the appropriate response from the drop-down menu. Click **Next**.

15. Provide the **Faculty Overall Rating** of "Meets the Expected Level of Performance" or "Improvement Needed." An employee who receives an overall rating of "Improvement Needed" will be ineligible for a general pay increase (GPI). Click **Next**.

Note: An overall rating of "Needs Improvement" should not be given to a faculty member who has not had documented coaching, disciplinary action, or a PIP during the evaluation period. **The annual performance review is not in lieu of coaching, progressive discipline, and the PIP process.**

16. **Before submitting the review, the associate dean/director is expected to schedule and conduct a performance review meeting with the faculty member to discuss the performance appraisal. Follow these steps:**

- Exit the review. Do not click **Submit**.
- Print two copies of this review or pull up the document on a computer screen and share with the faculty member.
- During the meeting, go over the review, provide feedback, and address any concerns.

17. Make any final necessary changes to the review online, click **Next**, then click **Submit** in the presence of the faculty member.

Employee Meeting Confirmation

Managers, complete the following steps before clicking "Submit":

1. Schedule and conduct a performance review meeting with the employee to discuss the performance appraisal.

2. During the review meeting, open the review on a laptop or tablet. As an alternative, you can print two copies of this review and bring them to the meeting.

3. During the meeting, go over the entire review, provide feedback, and address any employee concerns.

4. Make any necessary changes to this review online and confirm employee's acceptance at the meeting. *If you have not yet completed steps 1-4, please click "Save For Later" – do not click "Submit."*

5. In the presence of the employee, the supervisor should click "Submit." Once submitted, the review can no longer be modified.

6. The employee should log in within one to three business days to review, acknowledge, and submit the evaluation.

7. The supervisor will receive a final inbox item to acknowledge completion of the process.

Question   Have you conducted a performance review meeting with the employee? *Do not click "Submit" until you have done so.*
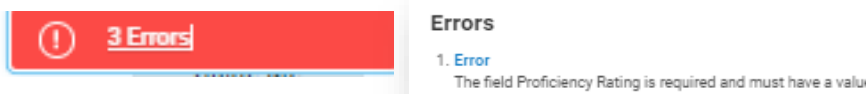
Manager

Rating   select one

Submit   Send Back   Save for Later   Close

18. If you receive an **Error** when attempting to submit, you must make corrections and click **Submit** again. To see error details, click the **Error** hyperlink in the red box. You may have to scroll up or down to see this box.

⊘ 3 Errors	Errors
	1. Error
	The field Proficiency Rating is required and must have a value

If you receive an **Alert**, you may make the change or not, depending on applicability. Click the alert to view details. You will have to click **Submit** again to ensure your review is submitted.
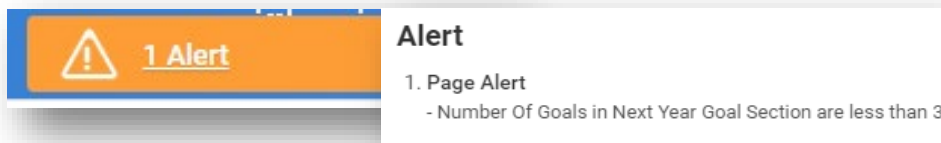
⚠ 1 Alert	Alert
	1. Page Alert
	- Number Of Goals in Next Year Goal Section are less than 3.

Your review has been submitted when you see the dialog box indicating success. If you do not see this box, your review is not yet submitted.

Success! Event submitted

Up Next: Provide Employee Review
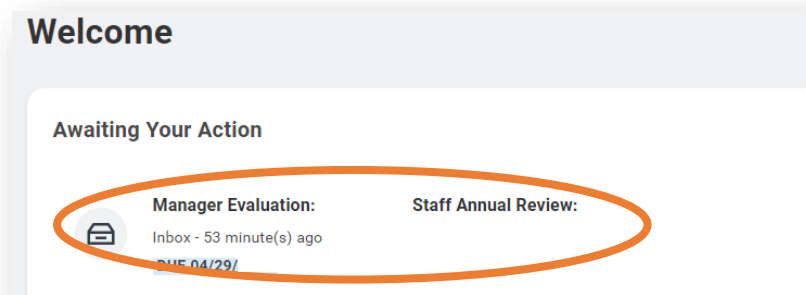Comments | Due Date 04/29/
View Details
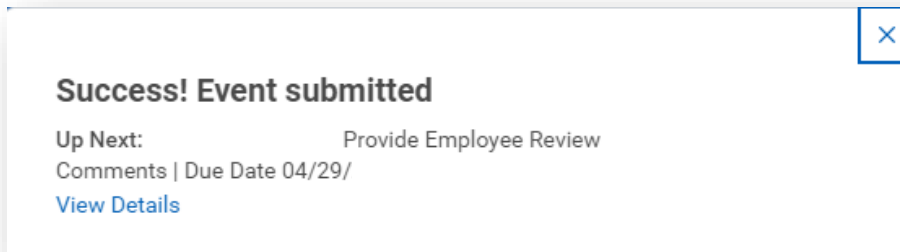
If the review is still in your **Action Items/Workday Inbox**, you have not successfully submitted.
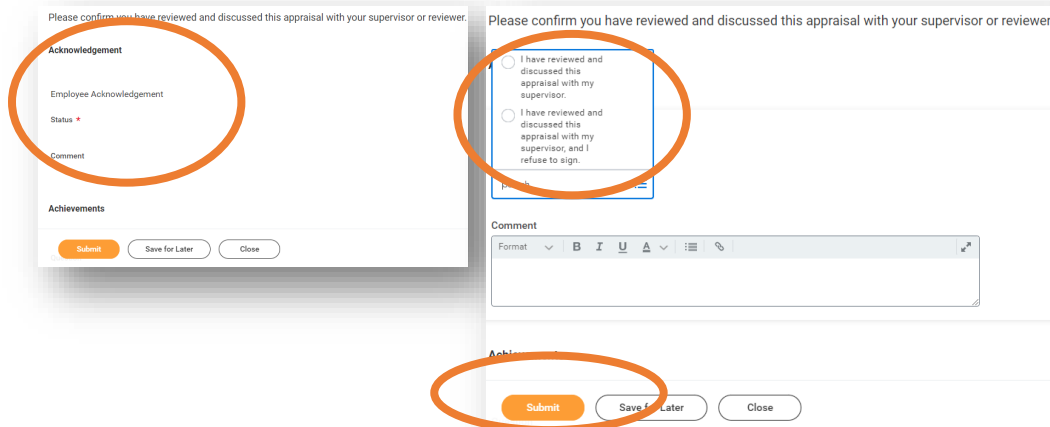
EMPLOYEE: REVIEW AND ACKNOWLEDGEMENT

From the Workday **Home/Welcome** page:

1. Launch the appraisal from your **Action Items/Workday Inbox.**

2. Select the appropriate acknowledgement **Status** from the drop-down menu. Add comments, if needed.
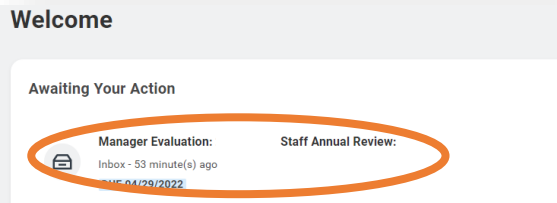

3. Click **Submit**.

Performance: Annual FT Faculty Review Manager/Employee

MANAGER: REVIEW, ACKNOWLEDGEMENT, AND FINAL SUBMISSION

From the Workday **Home/Welcome** page:

1. Launch the appraisal from your **Action Items/Workday Inbox.**

2. Carefully review the employee's comments. If the employee has written any concerning comments, please contact HR.

   Select the acknowledgement **Status** from the drop-down menu. Add comments, if needed.

3. Click **Submit**.