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OFFICE OF THE PROVOST AND VICE PRESIDENT
FOR ACADEMIC AFFAIRS

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To: Teaching and Resource Professionals and Academic Support Professionals of UPI Bargaining Unit B

Date: September 15, 2011

Re: Schedule for Personnel Actions and Credit Unit Guidelines Timetable

General Notice

Since 2002, the Schedule for Personnel Actions and the Credit Unit Guidelines Timetable have been combined to streamline the process and to improve communication and understanding. The Schedule for Personnel Actions and Credit Unit Guidelines Timetable are issued in accordance with the *2010-2012 EIU-UPI Unit B Agreement (Agreement)*.

Notice of Availability of Applicable Policies, Rules, and Regulations:

The University's Internal Governing Policies and the Policies and Regulations of the Board of Trustees are available in departmental offices, deans' offices, and the Office of Academic Affairs and are on file at the Reference Desk in Booth Library. Employees of the University are responsible for abiding by these policies. The Internal Governing Policies are also available at www.eiu.edu/auditing/IGP/index.html. The Board of Trustees Bylaws, Policies, and Regulations are available at www.eiu.edu/trustees/regulations_all.php. This information is provided in accordance with Article 13 of the *Agreement*.

Schedule For Personnel Actions

The *Agreement* calls for the development of a Schedule for Personnel Actions. The Schedule for Personnel Actions for AY2011-2012 is provided for the use of academic support professionals and annually contracted faculty and persons involved in making personnel recommendations related to these employees. It is provided as a courtesy and is not a substitute for reading the detailed provisions of the *Agreement*, on the evaluation of annually contracted faculty as well as on the annual evaluations, retention evaluations, and leave applications for academic support professionals. Copies of the *Agreement* are available at the Reference Desk in Booth Library and on the Vice President for Academic Affairs (VPAA) web page (<http://eiu.edu/acaffair/Contract/UB2010-2012CBA-Final-Sigs.pdf>) and on the UPI Chapter web page (<http://eiu.edu/EiuUpi/Contracts/Unit%20B.pdf>)

Special attention should be directed to Articles 8.1, 8.2, and 9 of the *Agreement* on evaluation procedures for annually contracted faculty, evaluation procedures for academic support professionals, and retention procedures for academic support professionals respectively.

Copies of all forms to be used in the AY2011-2012 evaluation process for academic support professionals and annually contracted faculty are available in the office of the department chair or supervisor and on the VPAA web page (www.eiu.edu/acaffair/Forms/ASPforms.pdf) for academic support professionals and on the VPAA web page (www.eiu.edu/acaffair/Forms/ACFforms.pdf) for annually contracted faculty members.

Leave Without Salary, Administrative Educational Leave, and Retraining Leave Applications

Although academic support professionals may submit requests for leave without salary (LWOS) at other times within three months of the start of the leave, they are encouraged, where possible, to submit their LWOS applications by November 1. The administrative educational leave and the retraining leave forms are due by November 1. Administrative educational leave and retraining leave application forms are available from the department chair/supervisor; use these forms for leave applications for 2012-2013. See Article 5 and Article 24 of the *Agreement* for details on leaves.

Annual Evaluations for Annually contracted Faculty

Supporting materials submitted by annually contracted faculty are attached to Form A-1 (Annually contracted Faculty Evaluation Portfolio for Annual Evaluation for Bargaining Unit and Non-Bargaining Unit Employees), which is available in the department office and online. Chairs may not alter or delete materials during the evaluation process. Additional materials requested by the evaluators during the evaluation process should be clearly labeled as such.

Annual evaluations of annually contracted faculty are conducted by the department chair with copies forwarded to the appropriate dean and to the Vice President for Academic Affairs (VPAA) and by deans with copies forwarded to the VPAA. See Article 8 of the *Agreement* for details. The evaluation is to be conducted for bargaining unit and non-bargaining unit annually contracted faculty, full-time or part-time (i.e., 50% or more for the academic year). The department chair's and dean's evaluation of the performance of annually contracted faculty shall be in the area of teaching/primary duties and based on the appropriate approved departmental application of criteria statement (DAC) in the area of teaching/primary duties. Performance levels affect placement on reemployment rosters; see Article 4.2.c.(3) of the *Agreement*. Department chair evaluations are submitted on Form B-1. Evaluations by the appropriate dean are submitted on form B-3. Copies of appropriate evaluation forms, departmental application of criteria statements, and summer rotation plans should be secured from the office of the appropriate department chair.

Annual and Retention Evaluations for Academic Support Professionals

Supporting materials submitted by academic support professionals are attached to Form A-2 (Academic Support Professionals Evaluation Portfolio), which is available in the supervisor's office. Department chairs/supervisors may not alter or delete materials during the evaluation process. Materials used in the evaluation shall be materials submitted by the employee in the evaluation portfolio, materials referred to in the employee's supporting materials, and materials in the employee's personnel file, except for confidential materials. See Articles 6.2, 8.2, and 9 of the *Agreement* for details on evaluation and retention procedures. All evaluations must be submitted on the appropriate forms available in each unit office.

Academic support professionals shall receive an annual written evaluation from their department chair/supervisor based on officially approved job descriptions, annual work plans, and materials and methods of evaluation statements. Copies of the evaluation shall be provided to the employee and placed in the employee's personnel file. Evaluations conducted in the employee's first, second, third, fourth, sixth, and eighth and each subsequent fourth year of employment at the University, thereafter, shall also contain a recommendation for retention or non-retention, in accordance with the provisions of Article 9.1 of the *Agreement*. Copies of appropriate evaluation forms, officially approved job descriptions, annual work plans, and materials and methods of evaluation statements should be obtained from the office of the appropriate department chair/supervisor.

Performance-Based Increases

Eligible Unit B ACFs and ASPs may apply for a performance-based increase (PBI). Eligibility requirements for both ACFs and ASPs may be found in Article 10.3 of the *Agreement*.

For ASPs, PBI evaluation criteria and procedures are specified in Article 10.4 and 10.5 of the *Agreement*.

For ACFs, PBI evaluation criteria and procedures specified in Article 10.4 and 10.5 of the *Agreement*.

Notification of intent to apply for a performance-based increase should be sent to the VPAA by November 15, 2011, with a copy to the chair and dean. Supporting materials should be submitted at the same time as evaluation materials are submitted. See Article 10 of the *Agreement* for further information.

Credit Unit Guidelines Timetable

The *Agreement* (Articles 6.3.a. and b.) calls for the VPAA to develop forms to be used to record officially assigned duties and to issue a timetable for distribution of credit unit guidelines, development of class schedules, and official assignment of duties. Please note:

1. The faculty workload report (Assignment of Duties) form has already been developed and is in use now. Faculty may access their workload report online through PAWS. Copies of the form are also available in the office of each department chair.
2. The Faculty Assignment of Duties Guidelines-Effective Fall 2011 are in effect for AY2011-2012. Copies of the guidelines are available in the office of each department chair and online at http://eiu.edu/acaffair/Contract/MOA_AoD_Guidelines_Fall%202011.pdf.

The attached document also contains the credit unit guideline timetable dates in effect this year for:

1. The development and distribution of credit unit guidelines in effect this year using the Faculty Assignment of Duties Guidelines-Effective Fall 2011;
2. The development of class schedules for the fall and spring semesters (including proposals by individual faculty members) and for the summer session;
3. The official assignment of duties for individual faculty members.

This information has been reviewed with UPI and is presented for the information of teaching and resource professionals and academic support professionals in the UPI bargaining unit, department chairs/supervisors, and deans.

Please review the attached Schedule for Personnel Actions and Credit Unit Guidelines Timetable for dates regarding your employment. Thank you.

Attachment: Schedule for Personnel Actions and Credit Unit Guidelines Timetable

cc: Deans (with attachment)
Department Chairs/Supervisors (with attachment)

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Unit B Schedule for Personnel Actions and Credit Unit Guidelines Timetable 2011-2012

*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
August 10, 2011			* Deadline for Deans to enter any final contract revisions into online workload system (only minor revisions to Summer 8-WK and overload assignments may be entered)	
September 2, 2011	* Spring 2012 Continuing Ed course proposals due to Continuing Ed (Note: Continuing Ed deadlines are now aligned with the on campus deadlines.)	* Spring 2012 Continuing Ed course proposals due to Continuing Ed (Note: Continuing Ed deadlines are now aligned with the on campus deadlines.)	* Spring 2012 Continuing Ed course proposals due to Continuing Ed (Note: Continuing Ed deadlines are now aligned with the on campus deadlines.)	
September 12, 2011		* Fall Faculty Activity Analysis forms mailed to deans for distribution to chairs by Planning and Institutional Studies for distribution to faculty	* Fall Faculty Activity Analysis forms mailed to deans for distribution to chairs by Planning and Institutional Studies for distribution to faculty	* Fall Faculty Activity Analysis forms mailed to deans for distribution to chairs by Planning and Institutional Studies for distribution to faculty
September 15, 2011				* VPAA provides employees with timetable for distribution of Credit Unit Guidelines, development of course schedules, and official assignment of duties (workload form)
September 23, 2011	* Fall Faculty Activity Analysis forms due to chairs	Fall Faculty Activity Analysis forms due from Faculty		
September 30, 2011		* Fall Faculty Activity Analysis forms due from chairs to deans	Fall Faculty Activity Analysis forms due from chairs to deans	
October 7, 2011			* Deans return fall Faculty Activity Analysis forms to Planning & Institutional Studies	

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
October 13, 2011		* Faculty workload reports due to deans (final fall 2011 and tentative spring 2012). Opportunity for faculty consultation required	Faculty workload reports due to deans (final fall 2011 and tentative spring 2012)	
October 17, 2011	* Faculty who desire not to teach in 2012 summer session notify chair in writing			
October 26, 2011			* Final fall/tentative spring faculty workloads and overload reports due to VPAA	Final fall/tentative spring faculty workloads and overload reports due to VPAA
November 1, 2011	* Applications for LWOS (leave without salary) for tenured/tenure-track faculty and ASPs for 2012-2013 encouraged; must be submitted 3 months prior to start of leave	Applications for LWOS for tenured/tenure-track faculty and ASPs for 2012-2013 encouraged; must be submitted 3 months prior to start of leave		
November 1, 2011	* Deadline for ASPs to apply in writing for administrative educational leave and retraining leave for 2012-2013 (copies to dean and VPAA, VPSA where appropriate)	Deadline for ASPs to apply in writing for administrative educational leave and retraining leave for 2012-2013 (copies to dean and VPAA, VPSA where appropriate)		
November 11, 2011	* Summer 2012 Continuing Ed course proposals due to Continuing Ed (Note: Continuing Ed deadlines are now aligned with the on campus deadlines.)	* Summer 2012 Continuing Ed course proposals due to Continuing Ed (Note: Continuing Ed deadlines are now aligned with the on campus deadlines.)	* Summer 2012 Continuing Ed course proposals due to Continuing Ed (Note: Continuing Ed deadlines are now aligned with the on campus deadlines.)	

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
November 11, 2011		* Chairs, directors, etc., submit ASP administrative educational leave, tenured/tenure-track and ASP retraining leave applications for 2012-2013 to deans	Chairs, directors, etc., submit ASP administrative educational leave, tenured/tenure-track and ASP retraining leave applications for 2012-2013 to deans	
November 15, 2011	* Annually contracted faculty/ASPs wishing to be considered for a PBI notify the VPAA of intent to apply, in writing, copy supervisor and dean/director			Annually contracted faculty/ASPs wishing to be considered for a PBI notify the VPAA of intent to apply, in writing, copy supervisor and dean/director
November 22, 2011			* Deans submit retraining leave, sabbatical, LWOS, and administrative educational leave applications for 2012-2013 to VPAA	
December 5, 2011				* VPAA communicates decisions on sabbaticals, retraining leaves, and administrative educational leaves
January 20, 2012	* All annually contracted faculty provide chairs with supporting material for annual evaluation; indicate PBI if three previous consecutive "superior" ratings	* All annually contracted faculty provide chairs with supporting material for annual evaluation; indicate PBI if three previous consecutive "superior" ratings		

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
January 27, 2012	* Fall 2012 Continuing Ed course proposals due to Continuing Ed (Note: Continuing Ed deadlines are now aligned with the on campus deadlines.)	* Fall 2012 Continuing Ed course proposals due to Continuing Ed (Note: Continuing Ed deadlines are now aligned with the on campus deadlines.)	* Fall 2012 Continuing Ed course proposals due to Continuing Ed (Note: Continuing Ed deadlines are now aligned with the on campus deadlines.)	
February 6, 2012		* Spring Faculty Activity Analysis forms mailed to deans for distribution to chairs to distribute to faculty	* Spring Faculty Activity Analysis forms mailed to deans for distribution to chairs	* Planning and Institutional Studies sends spring Faculty Activity Analysis forms to deans for distribution to chairs
February 7, 2012		* Chairs submit copies of annual evaluations of annually contracted faculty to deans and VPAA; copies to faculty	Chairs submit copies of annual evaluations of annually contracted faculty to deans and VPAA; copies to faculty	
February 14, 2012	* Annually contracted faculty submit to chair request for reconsideration of "unsatisfactory" recommendation	Annually contracted faculty submit to chair request for reconsideration of "unsatisfactory" recommendation		
February 16, 2012		* Final 2011-2012 faculty workloads and overload reports due from chair to dean, including final spring semester 2012 workloads based on official enrollment reports for spring semester; final Faculty Workload Report is the basis for overload payments (must be accurate)	Final 2011-2012 faculty workloads and overload reports due from chair to dean, including final spring semester 2012 workloads based on official enrollment reports for spring semester; final Faculty Workload Report is the basis for overload payments (must be accurate)	
February 16, 2012	* Spring Faculty Activity Analysis forms due to chairs	Spring Faculty Activity Analysis forms due from Faculty		

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
February 20, 2012	* Annually contracted faculty notify chair if they wish to be considered for employment during subsequent academic year	Annually contracted faculty notify chair if they wish to be considered for employment during subsequent academic year		
February 21, 2012		* Chair provides annually contracted faculty with written notification of reconsideration of "unsatisfactory" evaluation, copy to dean and VPAA	Chair provides annually contracted faculty with written notification of reconsideration of "unsatisfactory" evaluation, copy to dean and VPAA	
February 22, 2012			* Deans submit copies of annual evaluations of annually contracted faculty to VPAA, with copy to faculty	Deans submit copies of annual evaluations of annually contracted faculty to VPAA, with copy to faculty
February 24, 2012			* Final 2011-2012 faculty workloads and overload reports due from dean to VPAA, including final spring semester 2012 workloads based on official enrollment reports for spring semester	Final 2011-2012 faculty workloads and overload reports due from dean to VPAA, including final spring semester 2012 workloads based on official enrollment reports for spring semester
February 29, 2012	* Annually contracted faculty with unsatisfactory evaluation requests review by the ACF appeal committee			
March 2, 2012			* Deans return spring Faculty Activity Analysis forms to Planning & Institutional Studies	
March 7, 2012	Chair provides ACF evaluation materials to ACF Appeal Committee	* Chair provides ACF evaluation materials to ACF Appeal Committee		

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
March 7, 2012	* ACFs eligible for PBI and who did not achieve a 4th consecutive "superior" evaluation may submit PBI portfolio to department chair and also notify dean and VPAA	ACF PBI portfolios due		
March 15, 2012		* Deadline for withdrawing a multiple year ACF contract		
March 19, 2012		* Chairs provide ACF PBI portfolios with recommendations to deans, copy to annually contracted faculty	Chairs provide ACF PBI portfolios with recommendations to deans, copy to annually contracted faculty	
March 22, 2012	* Annually contracted faculty submit to chair requests for reconsideration of negative recommendation on PBI	Annually contracted faculty submit to chair requests for reconsideration of negative recommendation on PBI		
March 27, 2012	* ACF appeal committee report sent to Chair, copy to Dean and VPAA	ACF appeal committee report sent to Chair, copy to Dean and VPAA	ACF appeal committee report sent to Chair, copy to Dean and VPAA	ACF appeal committee report sent to Chair, copy to Dean and VPAA
March 27, 2012	Chair provides annually contracted faculty with written notification of reconsideration of negative recommendation of PBI	* Chair provides annually contracted faculty with written notification of reconsideration of negative recommendation of PBI, copy to dean		
March 30, 2012		* Chairs provide copy of re-employment roster of Unit B annually contracted faculty wishing 2012-2013 appointment to appropriate dean, VPAA, and UPI Chapter President		

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
April 2, 2012				* VPAA notifies ACF of evaluation decision (if chair evaluation was unsatisfactory)
April 2, 2012		* Tentative summer 2012 faculty workload reports due from chairs to deans; opportunity for faculty consultation required	Tentative summer 2012 faculty workload reports due from chairs to deans; opportunity for faculty consultation required	
April 6, 2012			* Deans provide ACF PBI portfolios with recommendations to VPAA, copy to annually contracted faculty	Deans provide ACF PBI portfolios with recommendations to VPAA, copy to annually contracted faculty
April 9, 2012				* VPAA provides PBI portfolios to ACF PBI Committee
April 12, 2012			* Tentative summer 2012 faculty workload reports due from deans to Director of Summer School	Tentative summer 2012 faculty workload reports due from deans to Director of Summer School
April 13, 2012			Tentative 2012-2013 workload reports due from chairs to deans; opportunity for faculty consultation required	
April 13, 2012	* ACF PBI Committee provides recommendations to VPAA, copy to annually contracted faculty			
April 16, 2012	* ASPs who elect to count previous years of service at the University toward a two-year appointment must notify the appropriate vice president in writing			ASPs who elect to count previous years of service at the University toward a two-year appointment must notify the appropriate vice president in writing

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
April 16, 2012	* ASPs provide supervisors with supporting material for annual evaluation and/or retention, merit and, where appropriate, PBI recommendations			
April 20, 2012	* ACF requests reconsideration of negative PBI Committee recommendation			
April 25, 2012	* ACF PBI Committee provides reconsideration results to VPAA, copy to annually contracted faculty			ACF PBI Committee provides reconsideration results to VPAA, copy to annually contracted faculty
April 30, 2012		* Supervisor provides ASP with annual written evaluation and/or retention recommendation; copies sent to appropriate dean/director and vice president	* Supervisor provides ASP with annual written evaluation and/or retention recommendation; copies sent to appropriate dean/director and vice president	

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
April 30, 2012		* By this date, after consultation with the ASP, supervisors (where director or chair is the supervisor) review employee's official job description and statement of methods and materials used for evaluation, develop tentative written work plan for the next year and submit plan to appropriate dean/director and appropriate vice president for approval, with copy to ASP	* By this date, after consultation with the ASP, supervisors (where director or chair is the supervisor) review employee's official job description and statement of methods and materials used for evaluation, develop tentative written work plan for the next year and submit plan to appropriate dean/director and appropriate vice president for approval, with copy to ASP	By this date, after consultation with the ASP, supervisors review employee's official job description and statement of methods and materials used for evaluation, develop tentative written work plan for the next year and submit plan to appropriate dean/director and appropriate vice president for approval, with copy to ASP
April 30, 2012				* VPAA notifies annually contracted faculty of PBI results
May 15, 2012			* Deans/directors provide retention evaluations for ASP, when necessary, to VPAA	Deans/directors provide retention evaluations for ASP, when necessary, to VPAA
May 16, 2012		Summer Faculty Activity Analysis forms mailed to chairs	* Summer Faculty Activity Analysis forms sent to deans for distribution to chairs	* Planning & Institutional Studies sends deans Summer Faculty Activity Analysis forms for distribution to chairs
May 25, 2012	* Summer Faculty Activity Analysis forms due to chairs	Summer Faculty Activity Analysis forms due from faculty		
May 25, 2012	* ASPs eligible for PBI and who did not achieve a 4th consecutive "superior" evaluation may submit PBI portfolio to supervisor and also notify dean and VPAA			

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
June 8, 2012			* Dean/director submits written recommendations on ASP PBI portfolios, where necessary, to appropriate vice president, copy to ASP. (This is only if the ASP did not receive the four consecutive superior evaluations.)	
June 11, 2012				* VPAA provides materials to ASP PBI Committee
June 13, 2012			* Deadline for Deans to enter Summer 4-WK, Summer 6-WK and Summer 8-WK contract revisions into online workload system (early submission highly encouraged)	
June 15, 2012				* Appropriate vice president provides each ASP with retention decision
June 18, 2012	* PBI Committee provides recommendations to VPAA, copy to ASP			PBI Committee provides recommendations to VPAA, copy to ASP
June 22, 2012	* ASPs request reconsideration if PBI Committee recommendation is negative			
June 22, 2012		* Chairs submit Summer Faculty Activity Analysis forms to deans	Chairs submit Summer Faculty Activity Analysis forms	

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*** Action Required**

Date	Faculty/Faculty Committees	Dept. Chairs Directors & Coordinators	Deans	VPAA Office/President/Other
June 25, 2012		* Final Summer 2012 faculty workload reports due from chairs to deans; this final faculty workload report is the basis for overload payments; accuracy is essential		
June 27, 2012	* PBI Committee provides ASP with results of reconsideration and copy to VPAA			PBI Committee provides ASP with results of reconsideration and copy to VPAA
June 29, 2012			* Deans return Summer Faculty Activity Analysis forms to Planning & Institutional Studies	
June 29, 2012				* Appropriate vice president provides each ASP with PBI decision
July 6, 2012			* Final Summer 2012 faculty workload reports due	
July 11, 2012			* Deadline for Deans to enter overload contract revisions into online workload system (minor revisions to Summer 6-WK and Summer 8-WK assignments also may be entered if necessary)	
August 9, 2012			* Deadline for Deans to enter any final contract revisions into online workload system (only minor revisions to Summer 8-WK and overload assignments may be entered)	