Texas A&M AgriLife Research Procedures

12.99.99.A0.01 | Faculty Performance Review

Revised: December 18, 2020

Next Scheduled Review: December 18, 2025

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PROCEDURE SUMMARY

Recurring performance reviews are an integral part of performance management for all employees. Due to the nature of work of professorial titled faculty, procedures are required which are different than those of non-faculty employees.

This procedure establishes the performance review cycle and outlines the procedures for the performance reviews of professorial titled faculty positions in Texas A&M AgriLife Research (AgriLife Research).

PROCEDURES AND RESPONSIBILITIES

1.0 PROCEDURES FOR ANNUAL PERFORMANCE REVIEW

All faculty reviews must be **completed no later than May 31st** each year.

1.1 Position Description

The position description is developed by the unit head and the appropriate subject-matter department head when establishing a new position or filling a vacant position. It describes the general duties and responsibilities associated with the position and is approved by the Director via Workday. It should be broad enough to allow flexibility when developing annual plans of work described in paragraph 1.2, but specific enough to serve as a guide during deliberations regarding eligibility for promotion.

The position description will be reviewed initially upon hire, and then annually during the performance review process by both the unit head and the faculty member to ensure that it reflects the current requirements for the position. Changes should be made when a significant shift in duties has occurred or is planned.

1.2 Annual Plan of Work

The annual plan of work should be consistent with the position description, and should reflect in detail the goals and objectives, and other tasks which are to be accomplished during the coming year. This document is prepared by the faculty member in consultation with the unit head. Texas A&M AgriLife (AgriLife) form AG-453, *Annual Plan of Work*, may be used as a checklist to aid in developing the annual plan of work. Upon completion, the plan of work will be attached to the performance review in Workday.

The annual plan of work for the previous year is used by the unit head as a point of reference in the evaluation process further described in Section 1.4, Documentation of Performance Review.

1.3 Annual Achievement Report

Prior to the annual performance review, the faculty member will prepare an achievement report—which documents performance during the past fiscal year and includes a summary of the achievement of goals and objectives from the previous year's annual plan of work. AgriLife form AG-452, *Faculty Achievement Report*, is a suggested format to be used when developing the faculty achievement report. Supporting documents—which confirm the quality of performance (e.g., awards, research grants, teaching evaluation forms)—should be attached. The completed annual achievement report will be attached to the performance review in Workday.

1.4 Documentation of Performance Review

The unit head is responsible for developing the appropriate documentation to reflect the outcome of the performance review and performance review conference. To do so effectively, the unit head should have copies of all earlier documentation plus evaluation reports from other sources (i.e., previous evaluation reports, senior staff and student evaluations, other administrator's feedback, etc.).

Note: The annual plan of work document will not be used as the documentation of the evaluation. These plans contain goals and objectives and are to be used as references against which to measure progress. They are management documents and are not treated as confidential information.

Off-campus unit heads should obtain an evaluation for each faculty member from the head of the applicable subject matter department and from other agencies or institutions where faculty hold joint appointments.

The format of the documentation of evaluation is left to the discretion of the unit head; however, unit heads may wish to consider using the format contained in AgriLife form AG-454, *Documentation of Faculty Evaluation, Suggested Format*.

The method of evaluation should provide for a narrative summary of the rationale for the performance review. It should include reinforcement of positive achievements and identification of areas where improvement can be made. Additionally, specific comments addressing promotion potential, salary adjustments, etc., may be made.

Comparative ratings may be appropriately used to show how the faculty member ranks with other faculty in the unit. When appropriate, suggestions for specific corrective action should be documented to provide a benchmark for future evaluation.

Refer to the Performance Review Schedule for form and time periods for evaluation.

1.5 A performance review conference will be held to discuss the faculty member's performance during the past year.

1.6 Filing Performance Reviews

Upon completion, the performance review will be uploaded into Workday, routed for approval, and stored in Workday. Other related documents will be stored in the faculty member's personnel file in Laserfiche.

DEFINITIONS

To be considered a member of the AgriLife Research faculty, an individual must hold one of the following titles:

Professor*
Associate Professor*
Assistant Professor*
Research Professor*
Research Associate Professor*
Research Assistant Professor*
Adjunct (Professor/Research Professor)
Adjunct Associate (Professor/Research Professor)
Adjunct Assistant (Professor/Research Professor)
Visiting (Professor/Research Professor)
Visiting Associate (Professor/Research Professor)
Visiting Assistant (Professor/Research Professor)

*Must follow procedures for annual performance review and promotion. (Adjunct and visiting professors are not eligible for promotion, and an annual performance review is not required.)

RELATED STATUTES, POLICIES, OR REQUIREMENTS

System Regulation 33.99.03, *Performance Evaluations for Nonfaculty Employees*

CONTACT OFFICE

Questions about this procedure should be referred to AgriLife Human Resources at 979-845-2423.

REVISION HISTORY

Approved:	June 25, 1997
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