2008-2010 Major Review Guidelines

MAJOR REVIEWS of LEO LECTURERS I AND II

College of Literature, Science, and the Arts
(Last Updated November, 2008)

Background


In addition, the College has prepared these supplemental guidelines for major reviews of LEO Lecturers I and II. Departments, Programs, Divisions, Institutes, Centers, and the Residential College (each may be referred to separately as an “Academic Unit”) may also promulgate major review guidelines (including criteria, procedures for classroom observations, etc.) so long as those guidelines do not conflict with the provisions of the UM/LEO Agreement, these guidelines, or both. If you have any questions about the major reviews of LEO Lecturers I and II, please contact the Dean’s Office (e.g., the Academic Labor Relations Representative).

Nothing in this document is intended to supplant or supersede any provision of the UM/LEO Agreement, or any applicable Memoranda of Understanding between the University and LEO (“MoUs”). Please consult the 2007-2010 UM/LEO Agreement and applicable MoUs for specific provisions governing major reviews.

In general, Lecturer I and II appointments are primarily for the teaching (and its related duties) of assigned courses. There is no requirement of any additional duties or responsibilities with these appointments (Article XI [B][1][a] and XI[B][2][a] – pp. 29, 31).

By mutual agreement between a Lecturer I or II and an Academic Unit, the Lecturer I or II may on an occasional basis perform additional duties or responsibilities. These additional duties or responsibilities may or may not be for compensation and may or may not be considered in the review process, as agreed upon by the Lecturer I or II and the Academic Unit (Article XI [B][1][b] and XI[B][2][b] – pp. 29, 31).

Layoffs (Article XII – “Layoff, Reduction in Appointment Effort, and Recall”) and Leaves of Absence (Article XXX – “Leaves of Absence Without Pay”) may affect the timing of the major reviews of Lecturers I and II; please consult the UM/LEO Agreement and the Dean’s Office with any questions.

1 Where used in this document, page references to the UM/LEO Agreement and related MoUs refer to the spiral-bound version of the 2007-2010 UM/LEO Agreement.
LEO Lecturers I – Major Review Schedule and Outcomes

Lecturers I are appointed for periods of one (1) or more semesters. Individuals may be appointed as Lecturers I until completion of a major review (Article XI [B][1][c] – p. 29).

A Lecturer I shall be eligible for a major review when he or she has worked eight (8) consecutive fall and winter semesters in an Academic Unit, or when he or she has worked at least eight (8) of the last ten (10) fall and winter semesters in an Academic Unit, whichever occurs first. If the eighth semester occurs during a winter semester, the Lecturer I shall undergo the major review during that semester. If the eighth semester occurs during a fall semester, the Lecturer I shall undergo major review during the next winter semester in which he or she is appointed (“MoU – Time to Major Review” – §[1][b], §[1][c], and §[1][d] – pp. 40-42).

Major reviews of Lecturers I will be completed, and decisions announced, prior to April 1 for appointment the following September as Lecturers II. If successful, a LEO Lecturer I will be offered a three (3) year appointment as a Lecturer II with “presumption of renewal” beginning the following fall semester (Article XI[B][2][d] – pp. 31-32). The Lecturer I will also receive a seven percent (7%) increase to his or her full-time rate effective on the 1st of September following successful completion of the first major review (Article XV[A][3][a][i] – pp. 59-60). If unsuccessful, the Lecturer I will not be reappointed beyond the academic year in which the major review takes place and will receive notification of termination (Article XI[B][2][d][ii][b] – p. 32).

LEO Lecturers II – Major Review Schedule and Outcomes

Lecturers II are appointed for single, three (3) to five (5) year appointments (Article XI[B][2][d][ii][a] and XI[B][2][e][ii][a] – p. 32). A Lecturer II whose first appointment in the Lecturer II title began on or after September 1, 2008 is appointed on a University Year Term (“UYrT”) basis. A Lecturer II whose first appointment as a Lecturer II began prior to September 1, 2008 will be appointed on either UYrT basis or University Year (“UYr” – Schedule I or II basis), depending on the individual’s one-time election during 2008 (MoU 6 – “Implementation of the 2007-2010 Collective Bargaining Agreement,” §5 – p. 123).³

A Lecturer II shall undergo a major review in the final year of her or his appointment. The major review shall be completed, and decisions announced, prior to April 1 for reappointment the following September (Article XI[B][2][e][i] – p. 32; MoU – Time to Major Review, §3 – p. 42).

² Lecturers II who successfully complete their first major review as a Lecturer II (e.g., second overall major review) are offered reappointment for three (3) years. Lecturers II who successfully complete their second major review as a Lecturer II (e.g., third overall major review) are offered reappointment for three (3) to five (5) years, at the discretion of the Academic Unit.

³ The appointment period for a UYrT appointee is September 1 through April 30; the appointment period for a UYr appointee is September 1 through May 31. A Schedule I UYr appointee is paid over the months July through June; a UYr Schedule II appointee is paid over the months September through August. Please contact the Dean’s Office (e.g., Academic Labor Relations Representative) with any questions about the appointment periods for a Lecturer II whose first appointment as a Lecturer II began prior to September 1, 2008.
A Lecturer II who successfully completes his or her first major review as a Lecturer II (i.e., second overall major review), will be offered a three (3) year reappointment as a Lecturer II beginning the following September. The Lecturer II who successfully completes his or her first major review as a Lecturer II will also receive a 7% increase to his or her full-time rate effective on the 1st of September following the major review (Article XV[A][3][a][i] – pp. 59-60). A Lecturer II who successfully complete his or her second or subsequent major review as a Lecturer II will be offered a three (3), four (4), or five (5) year reappointment, at the discretion of the Academic Unit, and beginning the following September (Article XI[B][2][e][ii][a] – p. 32). Please note there are no provisions in the UM/LEO Agreement or MoUs for a major review increase for a third or subsequent major review.

If a Lecturer II’s major review is unsuccessful, the Lecturer II will be given a one (1) year terminal appointment beginning the following September (Article XI[B][2][e][ii][b] – p. 33). The Academic Unit will work with the Lecturer II to develop a written remediation plan (see Article XX[B] – p. 79 – “Discipline and Dismissal”) for the terminal appointment. During the terminal appointment, the Academic Unit will conduct another major review. If the terminal appointment major review is unsuccessful, the Lecturer II’s appointment will end at the end of the terminal year (Article XI[B][2][e][ii][b] – p. 33). If the Lecturer II successfully completes the terminal year major review, he or she will be reappointed as provided above, and will receive the raise provided above, as appropriate.

Major Review Criteria, Guidelines, and Review Materials:

A. General Principles:

1. All major reviews are to be conducted with the thoroughness and inclusiveness of a third year review of the teaching performance of a tenure-track faculty member.

2. Each Academic Unit will establish and distribute (e.g., by email, as enclosures with appointment offer letters) written procedures and criteria for major reviews, including procedures for classroom observations, if observations are to be a part of the major review process.

New Lecturers will receive this information upon commencement of their initial appointment.

(Article XIX[A][3] – p. 74)

3. Except as otherwise provided in the UM/LEO Agreement or MoUs, the Academic Unit will determine the frequency of, the manner of, and the Lecturers’ responsibilities in Evaluations.

(Article XIX[A][4] – p. 75)

4. Within any Academic Unit, all evaluations in a given academic year will involve the application of consistent criteria for all Lecturers.
Lecturers must be notified of changes in evaluation criteria by July 31 for the upcoming academic year. Procedural changes to major reviews may be made after July 31 for the upcoming academic year, but the Academic Unit must reasonably notify its Lecturers of any such procedural changes.

(Article XIX[A][5] – p. 75)

5. A Lecturer with concerns regarding possible bias on the part of individuals involved in her or his major review must submit their concerns in writing prior to the beginning of the major review.

Such statements of concerns will not be part of the evaluation, but will be kept on file with the review.

(Article XIX[A][6] – p. 75)

B. Criteria – The general criteria governing major reviews of Lecturers I and II are excellence, expertise, and professionalism in the execution of assigned duties.\(^4\)

As noted above, and within any Academic Unit, all evaluations in a given academic year will involve the application of consistent criteria for all Lecturers. Lecturers must be notified of changes in evaluation criteria by July 31 for the upcoming academic year.


Specific criteria may address, but are not limited to:

1. Command of the subject matter;

2. Ability to organize material and convey it effectively to students;

3. Successful design and/or planning of course materials (as appropriate);

4. Ability to communicate and achieve appropriate student learning goals;

5. Effective interaction with students;

6. Growth in the subject field and in teaching methods;

7. Performance of required non-instructional duties where applicable.

(Article XIX[D][3] – p. 77)

C. Review Materials and Elements:

\(^4\) The factors considered in reappointing Lecturers include (1) continuing curricular need; and (2) availability of funding to support reappointment. Curricular need and funding availability are determined by the Academic Unit and the College.
The guidelines developed by the Academic Units must conform to the UM/LEO Agreement and applicable MoUs, and to the College guidelines, by including the following elements:

1. **Review Committee** – The unit will appoint a review committee of at least three (3) faculty members that includes at least two (2) tenured/tenure track faculty members (the Review Committee may include Lecturers, at the discretion of the Academic Unit).

   a. The committee will not include any faculty members who would encounter a conflict of interest in participating in the review of any Lecturer under review with that committee. Such a conflict of interest would occur in the event of a past or ongoing romantic, sexual, or familial relationship between a member of the faculty of the department or program and the candidate; this is not intended to be an exhaustive list of potential conflicts of interest. Faculty members who have a conflict of interest will not participate in any element of the review process or be present in any discussions of the case.

   b. The Academic Unit conducting reviews may choose to create separate review committees for individual Lecturers, or a single review committee to review the appointments of all Lecturers in the unit. In the latter event, it is permissible for the committee to consult with other faculty members when special disciplinary expertise is required for the review, or to rely upon ad hoc committees for classroom observations.

   c. Within any Academic Unit, all evaluations in a given academic year will involve the application of consistent criteria for all Lecturers (Article XIX[A][5] – p. 75).

   d. In the case of a Lecturer holding a joint appointment (i.e., Lecturer appointments in more than one Academic Unit within the College), a joint review committee may be formed. The joint committee will include either:

      i. All members from each of the Academic Units’ review committees or,

      ii. A subset of members from each of the Academic Units’ review committees such that the joint review committee consists of at least three (3) faculty members, and includes at least two (2) tenured/tenure-track faculty.

2. **Review Items and Materials:**

   a. A thorough assessment of review materials will be conducted and a written summary of the evaluation provided to the Lecturer and placed in the Lecturer’s personnel file.
At a minimum, review items shall include the following (Article XIX[D][5] – p. 78):

1) **Course Materials and Other Evidence of Teaching Performance** – the documentation must be thoughtful and thorough and should include the following:

   i. Two (2) sample syllabi from course(s) taught by the Lecturer

   ii. Report(s) from classroom visitation/observation (depending on Academic Unit policy).

If classroom observations are a part of the major review, written procedures for the observations must also be established and distributed. New Lecturers shall receive this information upon commencement of their initial appointment (Article XIX[A][3] – p. 74).

   iii. A table showing:

      a) Each course taught

      b) The enrollment in the course

      c) The mean grade for the course (where available)

      d) The Q1 and Q2 E&E scores for the course(s)

      e) Departments should also provide comparative Q1 and Q2 E&E data for the same or similar courses taught by other faculty.

      f) Mean grade data is also requested for the Lecturer and comparison faculty. Mean grade and enrollment data are available from the LSA Management Reporting System (“MRS”); the table should not include the names of other faculty.

      g) The average of the Q1 and Q2 scores for the Lecturer

      h) The average Q1 and Q2 scores for the same or similar courses taught by other faculty

   iv. Other evidence of teaching performance, including but not limited to:

      a) Information describing a course Website
b) Selected sample of tests that demonstrate alignment of assessment techniques with course goals

c) Selected sample of lecture notes or other teaching materials

d) Evidence of dissemination of teaching methods through workshops, presentations, publications

2) Student Evaluations (including Q1 and Q2 information identified above)

3) Review of Instructional and Non-Instructional (as appropriate) obligations (e.g., grading, student evaluations, delivery, unit-specific service responsibilities such as student recruitment efforts, development efforts, ad hoc committees)

4) Annual Reports

5) Interim Evaluation (for Lecturers I – Article XIX[C] – p. 76)

b. Review items may also include, but need not be limited to, the following:

1) Current Curriculum Vitae

2) Teaching Statement

3) E&E Evaluation Summaries – for each course taught since the last major review

4) Academic Advising (if applicable, provide number of advisees over the period covered by this review, the nature of the contacts with the students)

5) Curricular Development (if applicable – e.g. contributions to improve teaching quality in the Academic Unit, involvement in the unit’s assessment efforts, mentoring of other faculty, etc.)

6) Assigned Supervisory Responsibilities (e.g., the Lecturer may have assigned supervisory responsibilities for Lecturers, Graduate Student Instructors, or both)5

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5 A Lecturer with assigned supervisory responsibilities for other Lecturers may be excluded from the LEO Lecturer bargaining unit as a “Supervisory” employee. Please consult with the Dean’s Office if you have questions about the Supervisory status of a Lecturer in your academic unit.
Academic Unit and Dean’s Office – Major Review Checklist

Unlike the major reviews of Lecturers III and IV, the LSA Executive Committee does not review Lecturers I and II.

However, Academic Units should submit to the Dean’s Office (e.g., the Academic Labor Relations Representative) the LEO Lecturer I/II Major Review Checklist, the text of which appears on the next page.