

Article 29: Academic Performance Assessment (Progression Through the Ranks and Outstanding Achievement Awards)

This Article applies to the provision of Progression Through the Ranks (PTR) assessments and Outstanding Achievement Awards (OAA) to be awarded to Continuing, Limited Term, Contingent Term, Special Limited Term, or Pre-Tenure Track Appointment members of the academic staff. The assessment of Sessional Instructors is addressed in Article 23.

29.1 General Principles

29.1.4 For the purposes of this Article, the following shall apply:

- a) Academic Performance Report (APR): The biennial academic performance report shall be provided in a form at the discretion of the academic staff member. The APR should provide a summary of the academic staff member's academic work over the assessment period, outlining how the academic staff member has met the criteria in the GFC Handbook and Faculty Guidelines, and identifying any particular achievements they would like to be recognized in the following areas: (1) teaching; (2) research; (3) service, and/or 4) other academic work.

~~The report **must** is expected to be between 2 and 5 pages in length. This report shall be central to the PTR and OAA review processes. In the absence of a report submitted by the academic staff member, the Head's PTR assessment process will be based on the information they are routinely aware of (the assignment of duties, reports of research grants awarded, etc.). Should an academic staff member apply for an OAA, in addition to the regular APR material, the academic staff member shall be required to provide additional information supporting their application, which demonstrates their excellence and exceptional and outstanding performance. The academic staff member shall use their discretion to determine the appropriate substance and volume of material they wish to be considered for an OAA. An academic staff member who does not submit an APR will not receive a PTR. It is understood that academic staff members are responsible for submitting their APR, however where an academic staff member has demonstrated to the Head that there exists an exceptional circumstance that leaves them unable to submit an APR, and the Head has sufficient knowledge of the academic staff member's achievements in the absence of the APR to determine they meet the expected standards of performance, the Head in consultation with the Dean may recommend a PTR, and the Dean may provide a PTR. However, the expectation is that the supplementary OAA material will be limited to 5 pages in length.~~

- f) Head: In Departmentalized Faculties, the Head shall be the Department Head of the unit. In non-departmentalized Faculties, the Head shall mean the position(s) normally designated by the Dean to assign academic duties. The authority of the Head may not be delegated.

Revisions to Article 29 (Academic Performance Assessment)

As Outlined in the Memorandum of Settlement between the University of Calgary and TUCFA

Effective August 21, 2025

- g) Home Faculty: Where academic staff members have joint appointments across multiple Faculties, the Home Faculty shall be the Faculty where the majority of the appointment is held or, where there is an equal proportion between two or more Faculties, the Faculty shall be whichever the letter of appointment designates as the Home Faculty. Where the matter is unclear, the Provost and the Faculty Association shall agree on a Home Faculty. In the case of internal university secondments, the Home Faculty shall not be altered. In all cases of joint appointment and secondments, the Head in the Home Faculty shall solicit feedback from the other Faculties/units prior to drafting an assessment and merit recommendation. The decisions/recommendations of the Home Faculty shall apply to the entire appointment of the academic staff member.
- i) Outstanding Achievement Awards (OAAs): OAAs are increases to Rank Salary awarded to a limited number of academic staff. They are intended to recognize excellence and an academic staff member's exceptional and outstanding performance. The value of these Awards is established in Schedule A. Academic staff shall not be eligible for an OAA if they have received an OAA in the immediately preceding review cycle.

Should an academic staff member apply for an OAA, in addition to the regular APR material, the academic staff member shall be required to provide additional information supporting their application, which demonstrates their excellence and exceptional and outstanding performance. The academic staff member shall use their discretion to determine the appropriate substance and volume of material they wish to be considered for an OAA. However, the supplementary OAA material must be limited to 5 pages in length; any information beyond the fifth page will not be considered by the committee. The supplementary OAA material must include: the academic staff member's current rank, year of hire, year of tenure (if applicable), and a brief description of their distribution of teaching, service and research as applicable over the assessment period, and other academic work. Incomplete OAA applications will not be considered by the Faculty Assessment Committee.

29.4 Assessment Cycle

- 29.4.1 The performance of every Continuing, Contingent Term, Limited Term, Special Limited Term and Pre-Tenure Track Appointment academic staff member shall be formally reviewed on a biennial basis. The biennial period will be two academic years commencing on July 1 and ending on June 30. The assessment will be based on the biennial academic performance report. The PTR and OAA awarded in the assessment process will apply to each of the current and succeeding years. The deadline for the submission of biennial academic performance reports shall be established by each Faculty. The deadline established shall be no earlier than June 1, nor later than September 1.

~~For the 2023 cycle only, the deadline established shall be no earlier than July 17, nor~~

Subject to additional housekeeping changes

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~~later than September 1.~~

29.8 Assessment of Academic Administrators

29.8.5 Academic administrators will be assessed separate and apart from regular academic staff. Academic administrator OAA awards will be provided in addition to the total number allocated in Schedule 'A', Article 1.2.2.

29.9 Faculty Assessment Committees (FAC)

29.9.1 The FAC is a Dean's Advisory Committee composed of the following members:

Participating/Non-voting members:

d) One student appointed by the Students' Union (except in the School of Architecture, Planning and Landscape where the student shall be appointed by the Graduate Students' Association, **where available**).

29.9.5 ~~No Effective as of 2025,~~ no voting member of the FAC may be considered for an OAA.

29.11 Outstanding Achievement Awards

29.11.6 A Faculty may choose to opt out of the OAA system and instead have the equivalent value of the OAA applied equally to all academic staff members who would be assessed through the PTR/OAA process. To make this election requires: ~~a vote of 75% of all such academic staff members, plus the concurrence of the Dean. This decision by the Faculty must be made before the deadline for APRs~~

a) **achieving a quorum of 68% of the limited term, contingent term and continuing academic staff in the Faculty eligible for OAA casting a vote; and**

b) **75% or more of these votes cast in favour of opting out; and**

c) **concurrence of the Dean**

This decision by the Faculty must be made before the deadline for APRs to be submitted in a given review cycle.

~~For 2023 only, the deadline for this option will be extended to September 29, 2023~~