



Faculty Administration

TO: Chairs and Managers of Departments
FROM: Evan Pebesma, Director of Faculty Administration
DATE: September 2024
RE: Post Tenure Review for Tenured Faculty

This memorandum provides important information about the procedures for post tenure review, notification to faculty scheduled for review and mandatory training for tenured faculty.

Information for tenure-track and tenured faculty hires, tenure-track reappointment, tenured promotion review, and teaching-track faculty promotions will be sent in separate communications.

Included with this memorandum are several documents:

1. Updated list of tenured faculty in your department who need to complete training and submit an Attestation of Completion. Please complete and return to Evan Pebesma (epebesma@unc.edu), Janet Farrell (jcfarrel@email.unc.edu), and Teresa Wilkinson (tsmith7@email.unc.edu) **by October 30, 2024.**
2. List of tenured faculty in your department and tenured faculty holding full joint appointments in your department scheduled to undergo mandatory post tenure review during 2024-2025. Please complete columns I and J (if applicable) and return this spreadsheet to Evan Pebesma (epebesma@unc.edu), Janet Farrell (jcfarrel@email.unc.edu), and Teresa Wilkinson (tsmith7@email.unc.edu) **by October 30, 2024.**
3. A PTR submission checklist and instructions on how to submit via Infoporte to your Senior Associate Dean for review and approval.

Post Tenure Review for tenured Associate Professors and Full Professors

Full Joint Appointments

As documented in departments' Post Tenure Review Policies, in the case of a tenured joint appointment, the home/primary department and secondary department(s) will each conduct their own review. If each department agrees, the review may be completed with one joint post tenure review committee that includes eligible faculty members from all appointing departments.



Faculty Administration

Reporting Full Joint Appointment PTRs:

- For faculty with primary and full joint appointment(s) in the College, the primary department is responsible for submitting the required PTR documentation via InfoPorte when joint review is completed. If each department conducts its own review, each department is responsible for submitting the required PTR documentation via InfoPorte for review by the division senior associate dean.
- For those jointly appointed faculty who hold their primary appointment outside the College, the unit in which the faculty member holds the joint appointment will be responsible for reporting the date of the post tenure review, the overall rating and, if available, a copy of the PTR documentation. This information should be submitted via email to Evan Pebesma (epebesma@unc.edu), Janet Farrell (jcfarrel@email.unc.edu), and Teresa Wilkinson, (tsmith7@email.unc.edu).

The revised Post Tenure Review guidelines (2015) require the submission of the following documents to the Senior Associate Dean via InfoPorte:

- The faculty member's CV, self-assessment statements and summaries of student course evaluations for the past five years. *Please note: If your student course evaluation file is too large to upload as a single file, you can submit a help ticket to OASIS to have the file reduced.*
- Peer teaching evaluation(s) with cover sheet
- Post Tenure Review Committee Report signed by committee members. Departments must adhere to their departmental policy regarding the number of tenured faculty who serve on the PTR committee.
- Faculty member's response to the PTRC report, *if applicable*
- Chair's letter summarizing the PTR meeting with the faculty member and assignment of the overall review rating using the three-point scale (meets expectations, exceeds expectations, or does not meet expectations/deficient). *Note: only one rating can be assigned - do not assign a rating to each category of the PTR.*
Please note: We do not need a letter from the Chair to the Dean.
- Additional material as deemed appropriate, (e.g., a Development Plan), or as requested by the Senior Associate Dean.

Post tenure reviews are submitted via InfoPorte by June 2, 2025. Please use the attached instructions for submission.



Faculty Administration

Tenured Associate Professor Reviews

Tenured Associate Professors who elect to waive the full external review for promotion and undergo only the internal **mandatory** post tenure review, should submit their waiver requests to the department chair, along with an updated curriculum vita. These requests, including the chair's endorsement, should be submitted, via InfoPorte, to your Senior Associate Dean for review by **December 2, 2024**.

Note: If a tenured associate professor elects to undergo only the mandatory internal post tenure review - that review may be done in either the Fall or Spring semester of the year scheduled for review and should be completed by the end of the academic year for submission to the Dean's Office **no later than June 2, 2025**.

The semester listed on the Faculty Review Report indicates the semester the review needs to be completed in order to have a promotion effective date as noted below.

- **(Fall 24/25)** for a July 1 effective date
- **(Spr 24/25)** for a January 1 effective date

Notification to faculty scheduled to undergo PTR – Deferral Procedures

- **Deferral Procedures for Pending Retirement:** Faculty scheduled for post-tenure review during the fiscal year in which they plan to fully retire or enter phased retirement at the end of that year may request to defer their PTR. Those faculty should complete a [Faculty Review Deferral Request Form](#) in advance of the begin date of their scheduled post-tenure review if they wish to forego the review. The department chair will review and approve the PTR deferral by signing and dating the form. The completed form should be transmitted to the Dean's Office via RASR for review and approval by the appropriate Senior Associate Dean. Upon review and approval by the Senior Associate Dean, a copy of the signed form will be returned to the department for their records.
- **Deferral Procedures for Compelling Reasons:** **A request to defer a faculty member's post tenure review (other than pending retirement) should be submitted only for compelling reason(s).** A [Faculty Review Deferral Request Form](#) should be completed by the faculty member and submitted to the department head in advance of the scheduled post tenure review to ensure timely processing of the request. The request must specify the compelling reason(s). The department head is required to include a written justification to support the request. The completed Faculty Review Deferral Request Form should be submitted via RASR for review by the appropriate Senior Associate Dean and Dean. Requests supported by the Senior Associate Dean and Dean will be submitted to the Provost's Office for review and final approval. Upon receipt of the approved request a copy will be shared with the Department for their records and the faculty member.



Faculty Administration

NOTE: A semester or year's leave is not considered a compelling reason to request a deferral of a scheduled PTR. All aspects of the PTR should be completed except for the peer teaching review which can either be conducted in the semester prior to the scheduled leave or conducted during the first semester back on campus.

Mandatory Post Tenure Review Training

UNC System Office requires that all individuals involved in Post Tenure Review (PTR) complete the online training module. This training must be completed by all tenured faculty and include the submission of their attestations as evidence of compliance. The training module can be accessed [here](#). You should login with your campus username and password.

Faculty tenured as of July 1, 2024, and those hired with tenure effective July 1, 2024, should complete the mandatory training and attestation by **October 30, 2024**.

Attached is an updated spreadsheet that includes faculty in your department who have not completed the mandatory training as of distribution of this memo or who have been recently tenured or hired with tenure. Please ask these faculty members to complete the training and provide you with a copy of their signed attestation of completion. Submit the completed spreadsheet with a copy of the signed attestations to Evan Pebesma (epebesma@unc.edu), Janet Farrell (jcfarrel@email.unc.edu), and Teresa Wilkinson (tsmith7@email.unc.edu) by the **October 30, 2024 deadline**.

Post Tenure Review for Department Chair

The Senior Associate Dean determines the appropriate timing of post tenure reviews for department chairs at the time of appointment. To conduct the review, a committee of three tenured faculty members, including at least one senior member of the department faculty, will be appointed by the Senior Associate Dean. The review committee will submit its report to the Senior Associate Dean, who is responsible for meeting with the department chair and writing a brief summary letter to include the overall rating.

Post Tenure Review Checklist

Documents to be submitted to Dean's Office

Name of Faculty Reviewed: _____

CV

Faculty Self-Assessment to include the following:

- Research
- Teaching
- Service and engagement

Summaries of student course evaluations with quantitative data for past five years

PTR Committee Report signed by the committee members

Peer Teaching Observation Report and Cover Page – minimum of one review required

Class observations carried out as part of the PTR are normally carried out in the relevant academic year; they should preferably be carried out in the same semester as the post tenure review.

Chair's Letter written to the Faculty Member (must include overall rating using the three point scale exceeds expectations, meets expectations, does not meet expectations/deficient).

We do not need a letter from the Chair to the Dean. Please ignore the tab in Infoporte.

Faculty Response to Report (if applicable)

Development Plan (if applicable)

Upload into Infoporte as follows (instructions can be found on the Arts & Science intranet):

- Use the Faculty Tab
- Request Type = Post Tenure Review
- Route = Appropriate Division Senior Associate Dean
- Submit

NOTES: _____
