



MEMORANDUM: DCD #8, 2013-14

Date: 24 March 2014
To: Academic Administrators
From: Rick Halpern, Dean and Vice Principal (Academic) 
Re: PTR Assessment Process, 2013-14

The PTR awards for academic staff must be based on assessment of their activities for 2013-14. In order to evaluate a faculty member's performance the Chair/Director must have both a current CV and a completed Annual Activity Report for 2013-14. Where faculty have a budgetary cross-appointment, or a graduate appointment in another unit, the relevant Chairs/Directors must consult on their evaluation. Any faculty with budgetary cross appointments must submit their documents to each academic administrator and their PTR is allocated separately by each unit.

On 13 March, the Provost sent out PDAD&C #50, PTR/Merit and Salary Increase Instructions for 2013-14. These instructions contain a detailed discussion of the administration of the PTR/Merit scheme, including how to assess faculty who have been on research and study leave, maternity or unpaid leave, part-time faculty, and faculty who retired or ceased employment during the academic year. The instructions can be found at: <https://www.aapm.utoronto.ca/academic-salary-administration>

Please also refer to [DCD Memorandum #6 2013-14](#), which refers to a set of best practice guidelines for PTR assessment and templates of the UTSC Annual Activity Report for research and teaching stream faculty. They can be found at: http://www.utsc.utoronto.ca/~vpdean/chairs_manual.html.

Timeline for the UTSC PTR process:

Monday, 5 May: Academic administrators submit their activity report, paid activity report and update CV to the Dean.

Note: a separate pool will be set aside for allocation of PTR to academic administrators.

Wednesday, 28 May: HR will send spreadsheet with faculty lists to academic administrators.

Monday, 9 June: Academic Administrators submit departmental PTR assessments to the Dean and HR; this should include departmental PTR spreadsheets, copies of faculty CVs, and activity reports in *electronic format*.

Note: The PTR spreadsheets will include the name of the Chair and Vice- or Associate Dean, where applicable. No dollar value will be included in the spreadsheet. The PTR award will be allocated by the Dean.

Monday, 9 June: Academic Administrators submit recommendations to the Dean for the Dean's Special Merit.

The Special Merit pool consists of 5% of the total PTR contributions for UTSC. A Special Merit award is in addition to any PTR awarded in the departmental process. The purpose of this pool is to recognize colleagues who have demonstrated that they are leaders in their field or who have made an outstanding contribution. It is also a means to recognize exceptional performance by colleagues in small pools. Anyone recommended for Special Merit must be assessed for PTR at or near the top of the department. A recommendation for Special Merit must include a brief description of the colleague's outstanding contribution, an indication of his/her position in the PTR rankings of the department and your recommendation for a small, medium or large award.

TBD: Academic Administrators meet together with the Dean to discuss PTR and Special Merit allocations.

Monday, 16 June: Dean informs academic administrators of the Special Merit allocation.

Monday, 23 June: HR will distribute histograms to academic administrators.

Tuesday, 1 July: All faculty must have received written notification of their performance assessment and PTR award.