



MEMORANDUM: DCD #5, 2019-20

To: Academic Administrators
Cc: Desma Charlemagne-Michel, Director, Human Resource Services
From: Maydianne Andrade, Vice-Dean Faculty Affairs & Equity
Date: 27 March 2020
Re: PTR Process and Timeline – 2020

The PTR awards for academic staff must be based on assessment of their activities for 2019-20. 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 2019-20. 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.

- The Provost does not yet have an agreement with UTFA on compensation for faculty and librarians for July 2020. They will issue a further memo concerning compensation, and the performance evaluation process, as soon as possible. Any increases will be retroactive to July 1, 2020.
- Further information concerning the faculty and librarian performance evaluation and merit (PTR/5% merit) process is available here: <http://www.aapm.utoronto.ca/academic-salary-administration>
- Links to best practice guidelines for PTR assessment, Templates for the UTSC Annual Activity Reports and Paid Activity Reports are available under the 'PTR Process' tab here: <https://www.utsc.utoronto.ca/vpdean/forms-policies>

Timeline for the UTSC PTR process:

- 1 April:** Request Annual Activity Reports and Paid Activity Reports from your faculty. The deadline for submission of these reports should be no later than **1 June**; academic unit heads may need to set an earlier deadline to ensure timely submission of PTR assessments to the Dean's office.
- 1 June:** Academic administrators submit their activity report, paid activity report and update CV to the Dean via rhonda.martin@utoronto.ca. *Note:* a separate pool will be set aside for allocation of PTR to academic administrators.
- 1 June:** The VP Dean's Office will send spreadsheet with faculty lists to academic administrators. Since there is not yet an agreement on any salary increase amounts for faculty for July 2020, these spreadsheets may not include PTR data. PTR data will be provided after salary increase amounts are known.
- 30 June:** Chairs and Directors submit departmental PTR assessments to vdfaculty@utsc.utoronto.ca and fefe.wong@utoronto.ca in electronic format; this should include departmental PTR spreadsheets, VP Dean's special merit recommendation, copies of faculty CVs, Activity Reports and Paid Activity Reports.

Note: The PTR spreadsheets will not include the name of the Chair and Vice- or Associate Dean, where applicable. The PTR award for these individuals will be allocated by the VP Dean.

30 June: Academic Administrators submit recommendations to the VP Dean for the VP 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. One large merit award is fungible to two medium awards or four small awards. The award amount is directly scaled, so as not to exceed the total based on the large merit award. The VP Dean's Office will inform departments of the number of permitted nominations based on their faculty complement. This information will be included in the spreadsheets provided by 1 June.

30 June: Normally, all faculty should have received written notification of their performance assessment.

TBA: VP Dean informs Chairs and Directors of the Special Merit allocation after salary increase amounts are known.

TBA: The VP Dean's Office will distribute histograms to academic administrators after salary increase amounts are known.