

**From:** Academic Personnel  
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**To:** Academic Personnel <academicpersonnel@calpoly.edu>  
**Subject:** New Online System for Faculty Evaluations

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# Academic Personnel

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## *Interfolio ByCommittee for Faculty Evaluations*

To: All Faculty  
Cc: Deans, Associate Deans, College Analysts and Department Coordinators

### **New Online System for Faculty Evaluations**

Next academic year Cal Poly joins several other CSU campuses in implementing Interfolio's ByCommittee faculty evaluation software system. This new system allows faculty under review to create an entirely online Working Personnel Action File (WPAF), and it also manages the department level and administrative reviewing processes for every sort of formal faculty evaluation. The adoption of the ByCommittee online faculty evaluation system follows an intensive review process with significant faculty and administrative staff input including the Academic Senate and all the college dean's offices. Indications from other CSU campuses that have already implemented this system show that the transition in the processes of faculty evaluation from paper to online is straightforward for the users of the online system.

### **For faculty under review**

All faculty will have access to a dossier in which they can store and manage the materials they would include in their WPAF. This dossier will be accessible from their My Cal Poly Portal starting Spring Quarter 2018. When faculty are under review, they compile their online WPAF from their own materials in their dossier.

### **For faculty and administrators conducting a review**

Once the WPAF is submitted, the faculty conducting the review access the WPAF in the online system, which can also manage communications between the members of the review committee. The ByCommittee system manages the sequence of reviews moving items from one level of review to the next in ways that conform with our existing policies and procedures. For instance, a department peer review committee has access to the WPAF and completes its review with their report, all of which are then accessible to the next level of review, the department chair or head, and onwards to further levels of review until the process concludes with a final level of review.

### **Implementation of the online system**

Academic Personnel and ITS are working diligently to complete the required setup and framework for online review of WPAFs starting with the 2018-19 review cycle. Faculty use of the online WPAF system will be phased in, according to feedback from faculty including the Academic Senate, with the target for full implementation for all faculty evaluations by the 2020-21 academic year (AY).

During the 2018-19 AY all tenure-track faculty in probationary years one through four will use Interfolio; exceptions may be approved for using paper binders in this initial phase. Tenure-track faculty in their fifth and sixth probationary years may opt to submit their case electronically and be evaluated using the online Interfolio workflow, or to continue to use their WPAF binders with paper documents. Following this timeline, tenure-track faculty in probationary years one through five will use Interfolio and faculty in year six may opt for an online evaluation during the 2019-20 AY.

Throughout these two years of phasing in the system, faculty eligible for promotion and/or tenure will have the option to submit their case electronically. The timeline for lecturer and post-tenure periodic evaluations will be determined and communicated in September 2018. We anticipate that faculty will welcome the process of compiling an online

WPAF as previous implementations on other CSU campuses show that it offers significant workload reduction relative to assembling, moving, storing, and consulting binders full of papers.

**Timeline for deployment:**

- Week of May 7 the Dossier system comes online
  - Access to Interfolio Dossier through My Cal Poly Portal homepage
  - Academic Personnel supplies Business Process Guides (BPGs) to users regarding how to login to Interfolio and guidelines for naming documents as they are added to the dossier
  - Academic Personnel continues to update and make accessible FAQs
- May 15 to June 1
  - Academic Personnel sends 2018-19 RPT and evaluation eligibility lists to college analysts for proofing
- June 4
  - Eligibility lists are finalized
  - College analysts notify all eligible faculty
  - Probationary faculty in years one through four will be notified that they will submit an electronic WPAF (exceptions may be approved).
  - Provide all others with the option to submit a paper or electronic WPAF, and state their decision by the deadline of June 15.
- June 15
  - Faculty decisions on their preference for either a paper WPAF or the Interfolio online WPAF are due
- August 1
  - Interfolio case creation for tenured/tenure-track faculty required and/or opting for an electronic evaluation. After the case is created, faculty may start compiling and organizing their electronic WPAFs from the documents that they have been storing in the dossier.
  - Academic Personnel sends communication with training information and BPGs with information about Interfolio evaluation workflow steps (e.g., how to upload and share committee/evaluator reports with the candidate, how the candidate accesses the report and responds with a rebuttal statement, how and when to move the case forward to the next level of review, etc.)
- August 1 to September 20
  - Academic Personnel hosts trainings for faculty eager to start compiling their electronic WPAF
- September 26 and 27
  - Interfolio hosts trainings for faculty candidates and reviewers, and department/college staff with a maximum of 30 people per session.

Thank you,

**Academic Personnel**

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