

MEMORANDUM



Office of the Provost
and Vice-Principal (Academic)

To: Deans
From: Teri Shearer, Deputy Provost (Academic Operations and Inclusion)
Copy:
Date: December 11, 2020
Subject: Adjustments to Performance Reporting, Assessment and Merit Review

As you are aware, the University and QUFA have negotiated various amendments to the Queen's-QUFA Collective Agreement, of temporary duration, as a response to the COVID-19 Emergency. We have also adapted some personnel processes. Among the processes affected is Annual/Biennial reporting, performance assessment and merit.

The objective of a December 6, 2020 Memorandum of Agreement between the University – [Schedule E](#) and QUFA (the "[MOA](#)") was to recognize the impact of the COVID-19 Emergency on members by, in some cases, affording more time to report on achievements and activities, and more time for the University to consider the evaluation of this 2020 pandemic year.

At a high level, the biennial reporting cycle is shifting by one year, and we agreed that no member would be given a merit rating in respect of calendar 2020 when those assessments, determinations and adjustments would ordinarily occur in early 2021. Rather, each member will receive an annual salary adjustment in May 2021 that includes a merit component based solely on a score determined through assessment of the Member's achievements and activities in 2019.

The bullet points that follow summarize the specific adjustments to personnel processes of reporting, performance assessment and merit for Faculty, Librarians and Archivists, as set out in the MOA:

- Members who ordinarily report and are assessed biennially (i.e. Members with Tenure, or Continuing appointments or those holding a Special Appointment that has been renewed two or more times, "**Biennial Reporters**") will only need to **report (by**

submission to their Unit Head on or before February 1, 2021) on their activities and accomplishments in respect of calendar year 2019.

- Members who ordinarily report and are assessed annually (i.e. Members who are Tenure Track, Continuing Track, or who hold a Non-Renewable appointment, or a Special Appointment that has been renewed less than two times, **“Annual Reporters”**) who were employed in 2019 should have already reported on calendar 2019 earlier this year. Those Annual Reports will now be assessed a merit score.
- Annual Reporters will report (by submission to their Unit Head on or before February 1, 2021) **on their activities and accomplishments in respect of calendar year 2020, but only for formative purposes, not for determining a recommended merit score; such Members’ performance in calendar year 2020 will be assessed, and a merit score assigned in order to determine a salary adjustment in 2022.**
- Members who are **Annual Reporters** will submit an Annual Report, on before February 1, 2022, to record their achievements and activities in respect of calendar year 2021; such Members’ performance in calendar year 2021 will be assessed, and a merit score assigned in order to determine a salary adjustment in 2022.
- Members who are **Biennial Reporters** will submit an Annual Report, on or before February 1, 2022, to record their accomplishments and activities in respect of calendar years 2020 and 2021 (or, in other words, **the reporting cycle has been adjusted, making 2022 a biennial reporting year in which Biennial Reporters shall record and submit reports to their Unit Head, and receive evaluation and a recommended merit score for each of 2020 and 2021**).
- Deans of departmentalized faculties will, as per usual, assess **Department Heads’ performance in 2020** for the purpose of determining their administrative merit.

If you have any questions, please contact me or Ian Bearman in Faculty Relations (bearmani@queensu.ca).