



## Performance Assessment and Merit Allocation: Overview for Academic Leaders and Academic Staff

The following applies to all academic staff eligible for McGill's Academic Salary Policy.

Performance assessment for academic staff occurs annually as a way for Deans, Chairs, and Directors to assess the success and achievements of their academic colleagues in relation to their work and contributions over a given reference period. Performance assessment for a reference period determines a colleague's annual merit allocation: the strongest performers are assigned the highest merit category, whereas colleagues who have not met objectives or performed below expectations are attributed lower merit scores. Each merit category (1 to 5) is connected to the merit-based salary adjustment set out within the Academic Salary Policy that takes effect 1 June each year.

Each Department, as defined in the Academic Salary Policy, will inform their members of academic staff of the evaluation tools and expectations for the annual performance review and merit exercise.

Faculties have flexibility as to the process for evaluating performance and assigning merit. In some instances, a Department or Faculty-level committee oversees the process and makes recommendations to the Dean for implementation. In others, the Chair/Director (or, in the case of Faculties without Departments, the Dean or Vice-Dean) does this work on their own. The University, as well as Faculties, should reflect on the performance assessment and merit allocation exercise on an ongoing basis and revise criteria where appropriate.

There can be variability in the weight assigned to different academic activities, and this is typically determined at the Faculty level. Teaching, research, and service can be given equal weighting in the performance assessment review process.

Variations across units as to the process for assessing performance and the weighting of academic activities are acceptable provided that the following principles are consistently applied:

- Performance assessment must be aligned with a staff member's assigned academic duties as defined by relevant Regulations for [tenure-track and tenured faculty](#), [librarians](#), and [contract academic staff](#).
- The Faculty Dean and/or the Department Chair/Director should share, at the start of the reference year: (a) the weighting generally assigned to the different categories of academic duties (noting that there will be varied weightings for colleagues in various situations – e.g., those on sabbatical, those who hold senior administrative appointments) and (b) the annual Activity Report form that colleagues will be asked to complete at the end of the reference year. The Activity Report is the reference document associated with the assessment of each staff member's performance. During the reference year, the weighting assigned to different categories of academic duties and the annual Activity Report form must not change.
- Those charged with evaluating academic performance for merit must do so on the basis of information set out in the staff member's annual Activity Report, including details that explain adverse or extenuating circumstances experienced during the reference period. Other information relevant to assessing academic performance (e.g., teaching evaluations, willingness to take up and

effectively carry out assigned duties, notably related to teaching and service) can complement the contents of the Activity Report for the purposes of assessing academic performance and assigning merit.

- Assessments must be premised on expectations that are reasonable in light of career stage (e.g., an Assistant Professor's annual report might in some fields be different from a colleague's who has been tenured for several years).
- The Faculty Dean and/or Chair/Director will communicate a colleague's merit category to them in writing accompanied by an invitation to a meeting to discuss performance (i.e., the factors underlying the merit category) and academic plans and objectives for year(s) ahead. Performance review should be instituted as an annual activity for all academic staff. The University will provide Deans, Chairs and Directors with training on how to carry out performance assessment and merit allocation in an equitable and constructive manner.
- The communication that advises the colleague of their merit category should share information about the process by which they might seek to review/appeal their merit category. The Academic Salary Policy prescribes a timeline for appeals. Such a process begins with a discussion focused on providing reasons for decision. In that discussion, care must be taken to avoid sharing information about other colleagues, notably where a staff member seeks information about comparator data. Where, even after this discussion, a colleague seeks to contest their merit assignment, they might choose to do so via a complaint and grievance process made pursuant to the [Regulations Relating to Academic Staff Grievances and Disciplinary Procedures](#).