Berkeley Guidelines for timing of Submission of the Excellence Review

The following guidelines have been designed to maintain consistency across campus with regard to review periods for both Excellence Reviews and subsequent merits for Continuing Lecturers.

The UC-AFT contract notes in Article 7b.3

3. When a Unit 18 faculty member receives an appointment that includes a 12th semester, or 24th fiscal quarter of service in the same department, program, or unit, the University shall conduct the excellence review in accordance with this Article.

In order to assure the timely completion of the excellence review, these cases should be initiated during the **eleventh** semester, including materials up until the end of the **tenth** semester. The effective date would be the July 1, August 1, or January 1 following the **twelfth** semester worked.

In most cases, upon receiving a continuing appointment, the Unit 18 faculty would then be eligible for the first merit review three years from the effective date of the Excellence Review, with a review period extending back to the beginning of the eleventh semester. For Excellence Reviews with a January 1 effective date, the Unit 18 faculty will be transitioned to a July–June review cycle at the first merit review. The first merit review will have an effective date that is 2.5 years from the effective date of the Excellence Review, with a review period extending back to the beginning of the eleventh semester.

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| --- | --- | --- | --- | --- |
|  | **Scenario 1Teaches every semester; fall 2016 start** | **Scenario 2Teaches every semester; spring 2016 start** | **Scenario 3Teaches in fall only;fall 2010 start** | **Scenario 4Teaches in spring only;spring 2011 start** |
| Fall 2018 | 5 | 6 | 9 |  |
| Spring 2019 | 6 | 7 |  | 9 |
| Fall 2019 | 7 | 8 | 10 |  |
| Spring 2020 | 8 | 9 |  | 10 |
| Fall 2020 | 9 | 10 | 11 |  |
| Spring 2021 | 10 | 11 |  | 11 |
| Fall 2021 | 11 | 12 | 12 |  |
| Spring 2022 | 12 | Cont. Appt. eff. 1/1/22 |  | 12 |
| Fall 2022 | Cont. Appt. eff. 7/1/22 |  | Cont. Appt. eff. 8/1/22\* |  |
| Spring 2023 |  |  |  | Cont. Appt. eff. 1/1/23\* |
| Fall 2023 |  |  |  |  |
| Spring 2024 |  |  |  |  |
| Fall 2024 |  | 1st Merit eff. 7/1/24 |  |  |
| Spring 2025 |  |  |  |  |
| Fall 2025 | 1st Merit eff. 7/1/25 |  | 1st Merit eff. 7/1/25 | 1st Merit eff. 7/1/25 |
| Spring 2026 |  |  |  |  |
| Fall 2026 |  |  |  |  |
| Spring 2027 |  |  |  |  |
| Fall 2027 |  | 2nd Merit eff. 7/1/27 |  |  |
| Spring 2028 |  |  |  |  |
| Fall 2028 | 2nd Merit eff. 7/1/28 |  | 2nd Merit eff. 7/1/28 | 2nd Merit eff. 7/1/28 |
| Spring 2029 |  |  |  |  |
|  |  |  |  |  |
| ER Review Period | 7/2016 - 6/2021 | 1/2016 - 12/2020 | 8/2010 - 12/2019 | 1/2011 - 5/31/20 |
| ER Effective Date | 7/1/2022 | 1/1/2022 | 8/1/2022 | 1/1/2023 |
|  |  |  |  |  |
| 1st Merit Review Period | 7/2021 - 6/2024 | 1/2021 - 6/2023 | 7/2020 - 6/2024 | 1/2021 - 6/2024 |
| 1st Merit Effective Date | 7/1/2025 | 7/1/2024 | 7/1/2025 | 7/1/2025 |
|  |  |  |  |  |
| 2nd Merit Review Period | 7/2024 - 6/2027 | 7/2023 - 6/2026 | 7/2024 - 6/2027 | 7/2024 - 6/2027 |
| 2nd Merit Effective Date | 7/1/2028 | 7/1/2027 | 7/1/2028 | 7/1/2028 |
|  |  |  |  |  |
| \*The continuing appointment is effective at the start of the 13th semester (7/1 for AY appointees starting in the fall; 8/1 for fall only appointees; 1/1 for AY appointees starting in the spring and spring only appointees). Upon advancement to a continuing title, the appointee will be moved to a July - June review cycle during their first merit review period. Continuing lecturers teaching one semester out of the AY will be paid on a 1/10 basis (8/1 - 12/31 for fall lecturers; 1/1 - 5/31 for spring lecturers); the FTE will be reduced to 0 during non-teaching periods. |

It is understood that excellence reviews have already been initiated will not follow these guidelines. Excellence reviews with an effective date of July 1, or August 1, 2024 should follow the guidelines above.