



UNIT STANDARDS REVIEW
SIGNATURE FORM



Department of: Management and Marketing
Year: 2014/15

1) Department Chair:

[Signature]
Signature

11/24/2014
Date

2) Dean:

[Signature]
Signature

11/24/14
Date

3) Chair, UM Unit Standards Committee:

[Signature]
Signature

4/17/15
Date

4) Provost and Vice President for Academic Affairs:

[Signature]
Signature

6/2/15
Date

UNIT STANDARDS

DEPARTMENT OF MANAGEMENT AND MARKETING

The following document contains the Unit Standards of the Department of Management and Marketing, School of Business Administration. This document does not stand alone. It must be read and used in conjunction with the Collective Bargaining Agreement (CBA) between the UFA and the Montana University System that is currently in effect. In the event of any omissions or inconsistencies of these Unit Standards, the terms of the CBA shall be applicable and shall prevail.

I. Faculty Evaluation Committee

- A. The Faculty Evaluation Committee (FEC) shall be composed of, to ensure peer review, all tenure-track faculty members within the Department for whom the UFA is the bargaining representative under the CBA, except as follows:
1. No visiting faculty members shall be members of the FEC.
 2. A faculty member shall not be present during deliberations or voting concerning his or her own evaluation.
 3. A faculty member shall be a non-voting member of the FEC during the first academic year in the Department.
 4. Only tenured faculty members shall be present during deliberations or voting on tenure matters.
 5. With respect to promotions, voting FEC members may cast ballots only on faculty who are seeking promotions to the voting member's own rank or to one rank above (i.e., an assistant professor can only vote on requests for promotions from assistant professor to associate professor, but not on associate to full professor).
- B. The Department Chair shall call a meeting of Department Faculty by September 15 to choose an FEC Chair. The FEC Chairperson shall be a tenured faculty member of the Department, and shall be chosen by a majority vote of the FEC-eligible committee members.
- C. The Committee may receive or seek evidence from any source relevant to the evaluation of any faculty member in the academic unit so long as the evidence is relevant to the approved unit standards and the faculty member to whom the evidence pertains is afforded full opportunity to review and respond to the evidence. Note CBA 10.230 that different types of evidence afford different confidentiality requirements.

- D. Upon request of any faculty member being evaluated, the Committee shall afford the faculty member an opportunity to address the committee personally regarding the committee evaluation.
- E. The results of the FEC vote will be forwarded by the FEC Chair to the Department Chair and to the FEC as "concur" or "not concur." A "concur" is defined as support for the requested action by more than 50% of the committee members voting (i.e., a vote resulting in a tie is considered "not concur"). A quorum for purposes of voting shall consist of at least three eligible faculty members. Voting shall be done through written secret ballot.

The exact vote tally (i.e. the number of votes "concur" and "not concur") shall be reported to the Department Chair. The exact vote tally shall be made available to the affected faculty member and members of the FEC only on request by the faculty member or FEC members—and then is made available to either—, but otherwise shall not be made public or made part of the affected faculty's record.

- F. The duties of the FEC Chair shall be to call and conduct a meeting of the FEC in accordance with the CBA Section 10.230, tally and forward the vote as outlined above, compile and summarize comments from the FEC which are made available to the affected faculty members, and to write the actual evaluations. It is very important that the evaluations by the FEC Chair provide annual feedback to non-tenured faculty members with respect to their progress towards tenure.
- G. The Department Chairperson prepares an individual recommendation for each faculty member in the unit in accordance with the CBA Section 10.240.
- H. Each faculty member being evaluated shall sign the recommendations of the FEC and the Student Committee for Faculty Evaluation and the Department Chairperson to signify that he/she has read them and to attest to the accuracy of the supporting documents. The signature does not signify the faculty member's endorsement of the recommendations. The faculty member may appeal the recommendation as per CBA 10.230.
- I. The FEC Chair will call a meeting of the FEC to conduct an evaluation of the Department Chairperson regarding his or her duties as chairperson that is separate of the typical FEC evaluation. The results will be forwarded to the Department Chairperson and the dean by April 15th. The Department Chairperson may respond to this evaluation in writing to the FEC and dean.

II. Student Evaluation Committee

- A. The Department Chairperson will appoint at least three students, including at least one student member from each of the emphasis areas (Management and Marketing) to the Student Evaluations Committee (SEC).

- B. The FEC Chair will act as a non-voting liaison to the SEC and provide guidance for the SEC concerning the evaluation process.
- C. The chairperson of the Department will provide the annual summary evaluation reports of the faculty member's performance for each of the classes taught to the SEC.
- D. The SEC will make its report to the FEC Chair by Oct. 15th (see CBA 10.220).
- E. Neither error nor omission of student participation in any evaluation may constitute grounds for a grievance. The evaluation procedure may proceed without participation by the SEC.

III. Documentation

- A. Each faculty member shall document his or her performance as indicated in CBA 10.210. (For a more specific statement of evidence which may be used to document teaching, service and research see Part IV. C. 1. 2. and 3. in this document.) Such documentation shall be made to a degree sufficient to allow the FEC to make a competent judgment of the faculty's performance.
- B. All faculty members are to include a self-assessment summary (no more than one page in length) of the required documentation regarding the required action. For instance, a faculty member requesting merit needs to indicate in which area(s)—teaching, research or service—the applicant considers his or her performance above normal or outstanding (see CBA 10.110 and Section VII below.).

The self-assessment as well as the Individual Performance Record (IPR) submitted as part of the documentation may only include the information pertaining to the timeframe for which the action is requested. For instance, a faculty member requesting merit for the period of 2004–2007 may only list activities for this timeframe.

- C. Should the FEC require additional documentation, the FEC Chair shall so inform the faculty member in writing by November 1st. The exact nature of the additional documentation must be specified. The faculty member shall submit the requested additional documentation within 5 working days of receipt of the request.
- D. The FEC Chair shall not accept material after the deadline without approval of the FEC.

IV. General Criteria

- A. Faculty responsibilities in the areas of teaching, service and research are outlined in the CBA in Section 10.110. The following are intended as an elaboration of these sections.

- B. Each faculty member is expected to function in a professional manner within the Department by carrying an equal share of such routine activities as advising, registration, committee work, and student and faculty recruiting. Faculty members are also expected to contribute in other department matters, such as class scheduling, coordinating course materials with other faculty, curriculum work, and participating in faculty meetings.
- C. The following lists provide examples for evidence of teaching effectiveness, service and scholarship. They are to be used only as a general guide because the Department does not wish to constrain creative endeavors which would further the objectives of the University. These lists are not intended to be all inclusive and it is expected that a faculty member engage in these or other similar activities.
1. Evidence of teaching effectiveness:
 - a) An evaluation form consisting of questions determined and approved by the Department should be provided to students for every course taught during the academic year. At a minimum, the summarized results of the questions, as presented in the computer print-out, shall be included as evidence.
 - b) Other evidence of teaching effectiveness including, but not limited to, the following:
 - peer evaluation
 - course syllabi and other instructional materials
 - innovations in teaching or advising
 - new course and curriculum development
 - participation in general education activities
 - use by other scholars of instructional materials prepared by a faculty member
 - participation in professional development activities aimed at improving teaching
 - c) Direction of student research.
 - d) Active and productive participation in student advising.
 - e) Invited lectures/teaching at outside institutions
 2. Evidence of university, community, or professional service:
 - a) Active participation in professional organization(s), including, but not limited to such matters as chairing sessions at meetings, refereeing papers for presentation or publication, and serving as an officer or a committee member of a professional organization.

- b) Delivering continuing education, such as extension courses, workshops, and/or seminars for business and government personnel.
- c) Rendering professional service as a member of private or public boards or committees.
- d) Active and productive participation in the development of the Department and school, including but not limited to curriculum development and service on school/department committees.
- e) Active and productive participation on campus-wide faculty committees.
- f) Consulting, compensated or uncompensated, which contributes to professional growth and/or enhancement of the University.
- g) Other significant public community or university service which contributes to professional growth and/or enhancement of the University.

3. Evidence of scholarship:

- a) Publication of journal articles, books, cases, software, proceedings' articles or monographs.
- b) Receipt of grants for research or other scholarship activity.
- c) Presentation of papers at meetings of professional organizations or invited scholarly presentations at other institutions.

V. Degree and Qualification Requirements for Tenure-track Employment

A terminal degree for the Department is defined as an earned research doctorate (PhD) in the faculty member's area of competence or the juris doctorate (JD). Before offering employment to any individual who does not possess the appropriate doctorate degree or the JD, the Department Chair will determine if the candidate meets the criterion of having equivalent professional experience. Examples include high-level corporate or government experience relevant to the position or unique experience in business, government or not-for-profit organizations which provides the candidate with special qualifications. This determination will be done by the Department in consultation with the Dean and the Department Chair. Appropriate professional experience cannot be granted or earned while an employee of the University except by taking leave to pursue such experience.

The concept of appropriate professional experience is not to be taken lightly by the Department. It can only be granted for major and significant experience directly related to the responsibilities of the faculty member. The documentation required to support appropriate professional experience will vary with each individual depending on factors such as the

organization in which the experience was acquired, the level of responsibility held in the organization, diversity of experience, and other factors. For this reason a standard documentation format cannot be specified that will fit all cases.

Prior to a consideration of appropriate professional experience the Department, the Department Chair and the Dean will meet and determine what documentation will be required. A statement specifying the requirements will be communicated to the candidate in writing so that the evidence may be returned prior to action.

VI. Definitions

- A. **Satisfactory Teaching.** Requests for promotion, tenure, normal and retention action require evidence of satisfactory performance in teaching. Courses should be designed so that they are rigorous, challenging and conducive to learning. Interpretation of student evaluation scores should be made in conjunction with the average GPA for the class, class size, course level and whether the class is required or optional. For example, it is understood that given the same level of teaching effectiveness, evaluations will be poorer in a large lecture class than in a small discussion class, poorer in a required class than in an elective, poorer in a lower division class than in an upper-division class, and poorer in a class where the average grade is lower than in a class where the average grade is higher. Other factors such as significant course and curriculum development, including development and/or use of innovative teaching methods and materials, new course preparations and professional development related to instruction may also be considered as evidence of teaching effectiveness.
- B. **Satisfactory Scholarship.** The definition of Satisfactory Scholarship varies with the requested action by the faculty member as outlined in Section VII.
- C. **Satisfactory Service.** The definition of Satisfactory Service varies with the requested action by the faculty member as outlined in Section VII. and described in CBA 6.200.
- D. **The Concept of Professional Growth.** The concept of professional growth, as stated in the CBA 10.110, shall be based on a thorough assessment of the applicant's performance while at The University of Montana—Missoula. The overall guiding criteria in evaluating professional growth for a faculty member shall be his or her demonstrated ability to carry out the academic responsibilities in the areas of teaching, scholarship and service as stated in the CBA. The FEC is responsible for assessing the performance of the faculty member based on the criteria in the CBA, the elaboration of the criteria in this document and any other information put before the Committee by the individual being considered.

VII. Requested Action

A. Promotion:

1. Promotion to any rank will depend upon attainment of the academic qualification and an academic record appropriate to that rank. Promotion is not, in other words, merely a matter of years in rank. It is the faculty member's responsibility to apply for promotion in a timely manner, in accordance with provisions of the CBA. In addition to the criteria listed in the CBA the following will apply:

2. Assistant to Associate Professor

All candidates for promotion to Associate Professor must present evidence of satisfactory performance in teaching as described in IV.C. In addition, the candidate must present evidence of satisfactory performance in scholarship and service while in the Department. The character of the service in rank as Assistant Professor shall be such that there is a clear demonstration of professional growth and an increasingly valuable contribution to the University.

For promotion to Associate Professor, satisfactory performance in scholarship will normally be evidenced by three or more refereed journal publications while at the assistant rank, related to the candidate's field of expertise, and be evidenced by "other related activity" demonstrating potential for future professional growth. At least two of the three articles must be published in quality nationally respected journals. In recognition of the increased time and effort required to publish in premier journals, a publication in a clear A-level journal will count as much as two lower-level, quality nationally respected publications. Evidence for journal quality must be provided by the candidate. Assistant Professors are encouraged to seek related guidance from more senior Department colleagues. Evidence of "other related activity" may include non-refereed publications, presenting papers at conferences, discussing conference papers, chairing sessions, participation on conference program committees, serving as an editor or reviewer for professional journals, assisting in organizing conferences, developing cases or books for publication, and developing software or other innovative materials for publication.

Satisfactory service is evidenced by active service on at least two committees per year and efforts to contribute to the goals of the department, school and university.

3. Associate to Full Professor

All candidates for promotion to Full Professor must present evidence of satisfactory performance in teaching as described in IV.C. In addition, the candidate must present evidence of satisfactory performance in scholarship (such evidence to normally include at least three refereed journal publications while at the rank of associate professor and related to the candidate's field of expertise) and service. At least two of the three articles must be published in quality nationally respected journals. In recognition of the increased time and effort required to publish in premier journals, a publication in a clear A-level journal will count as much as two lower-level, quality nationally respected publications. Evidence for journal quality must be provided by the candidate. The character of the service in rank as Associate Professor shall be such that there is a clear demonstration of professional growth, the development of a professional reputation beyond the University of Montana, and an increasingly valuable contribution to the University.

For promotion to Full Professor, satisfactory performance shall be defined as assuming leadership roles in the areas of teaching, research and service. Evidence of a clear demonstration of personal professional growth and an increasingly valuable contribution to the faculty member's area of expertise via additional refereed publication or "other related activities" as defined in Section IV.C.3. over and above those activities required for promotion to Associate Professor is expected for promotion to Full Professor.

B. Tenure:

Granting of tenure reflects not only past performance, but potential for significant future growth to the standard expected for promotion to Full Professor. This potential is evaluated based on demonstrated activities beyond those that were the basis for the promotion decision. Evidence shall be provided by the candidate that demonstrates research currently in development, activities that update and improve the applicant's teaching, and increasing accomplishments with respect to service responsibilities. The Department does not require an external review for the award of tenure. However, demonstration of activities to develop a national or international reputation is required.

The attention of those faculty members concerned with tenure is further directed to the CBA sections 9.310 through 9.340 and 10.110-2.

C. Merit Recognition:

Merit recognition is covered in the CBA in Section 10.110. To be eligible for merit a faculty member must have demonstrated above normal performance in at least two of the three areas—teaching, scholarship, and service—or outstanding performance or

special recognition in at least one of these areas and at least normal performance in the remaining area(s). Receipt of a merit award does not provide sufficient evidence that the requirements of promotion and tenure have been met.

D. Normal:

The performance of a majority of faculty members will generally be evaluated as "Normal." They will be expected to grow in value to the institution, through continued satisfactory teaching, scholarship or service, and will be rewarded with a normal increment to their salary.

E. Less-Than-Normal Increment:

Less-than-normal increment is covered in the CBA in Section 10.110 3.C. and is recommended for either the absence of any performance or poor performance of assigned responsibilities within the scope of employment.

F. Reappointment:

The CBA provides that the FEC shall make a recommendation concerning reappointment. The following statements in this section are intended as amplifications of the Contract language in Section 9.230

The documentation and evidence submitted by the faculty member in conformance with the CBA and this document will also be used by the FEC in consideration of reappointment or non-reappointment. As indicated in the CBA (10.200) the Committee may also receive or seek evidence from other sources and may request additional documentation from the faculty member being evaluated.

The procedure used for making a recommendation concerning reappointment or non-reappointment will be the same as that provided in the CBA and this document for making recommendations concerning tenure, salary and promotion. That is, satisfactory performance in the area of teaching, service and scholarship is required.

G. Non-reappointment:

Non-reappointment (CBA 9.230) of a probationary faculty member (tenure track or non-tenurable) will be recommended when the FEC makes a judgment that the performance of the faculty member is unsatisfactory with respect to those standards, resulting in less-than-normal increment for two (2) successive years.