



UNIT STANDARDS REVIEW
SIGNATURE FORM

School of Integrative Physiology and Athletic Training

Year: 2022-2023

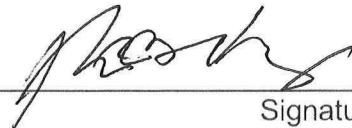
1) Department Chair: John Quindry



Signature

3-14-2023
Date


2) Dean Humphrey



Signature

3.15.2023
Date

3) Chair, UM Unit Standards Committee:



Signature

March 16, 2023
Date

4) Provost and Vice President for Academic Affairs:



Signature

January 16, 2024
Date

UNIT STANDARDS FOR PROMOTION, MERIT, TENURE, SALARY
DETERMINATION OR RECOMMENDATION FOR RETENTION

SCHOOL OF INTEGRATIVE PHYSIOLOGY AND ATHLETIC TRAINING

INTRODUCTION

The standards contained in this document are consistent with the general University guidelines for faculty advancement and have been approved by the faculty of the School of Integrative Physiology and Athletic Training (IPAT). The purpose of the Unit Standards is to provide a framework for the evaluation of faculty performance as it relates to specific University and School responsibilities. In any evaluation for purposes of promotion, award of tenure, salary determination, or recommendation for retention, performance in teaching, service, and scholarship/creative works are each important and essential, as set forth in section 6.200 of the *Collective Bargaining Agreement* (CBA). However, as IPAT is a diverse unit, the blend of academic responsibility may vary as the School has different expectations for each faculty position. The character of the performance shall be such that there is a clear demonstration of professional development, and increasingly valuable contribution to the University, and a discernable commitment to furthering the mission of the School.

These Unit Standards and procedures are intended to be in addition to, and consistent with, those provided in the current CBA, and in the event University Standards and Unit Standards conflict with each other, or are otherwise inconsistent with each other, the University Standards shall control all interpretations and applications.

Recommendations for change of the Unit Standards may be submitted to the University Standards Committee by the unit faculty, the Chairperson of the IPAT Unit Standards Committee, the appropriate Dean, or the Provost. The unit faculty, School Chairperson, the University Standards Committee, the appropriate Dean, and Provost must approve any proposed change. Any changes in unit standards resulting from this process shall not take effect until twelve (12) months after the decision, unless agreed otherwise by the unit faculty, the Dean, and the Provost. As supported by article 10.100 of the CBA, until those changes are made and approved, the current Unit Standards remain in force.

UNIT PHILOSOPHY

The University of Montana and the mission of the College of Health, the School of Integrative Physiology and Athletic Training endeavors to provide a well-balanced educational approach that stimulates growth in the physical, social, emotional, spiritual, and intellectual dimensions of life. The School of Integrative Physiology and Athletic Training prepares graduates to be competitive entry level professionals or candidates for advanced study in applied and clinical health professions. The faculty, staff, and students of the School of Integrative Physiology and Athletic Training engage in professional

education, scholarly activity, and meaningful public service. The School emphasizes the integration of healthy lifestyles, basic science, preventative medicine, and clinical care across the lifespan. In short, the School of Integrative Physiology and Athletic Training assists students in becoming conscientious and responsible adults.

To provide IPAT students with the most favorable and productive educational environment, and unless otherwise designated by their full-time-equivalent appointment, all IPAT tenure-track faculty members are at one and the same time: (1) teachers, (2) active members of the University and, (3) scholars. Teaching, service, and scholarship are considered overlapping and complementary activities intended to enhance student learning experiences though individual faculty contributions vary dependent on professional specialization demands, and are determined by the total activity of the faculty, escalating enrollments, and the School's need to fulfill its mission.

EVALUATION SCHEDULE FOR TENURED AND TENURE TRACK FACULTY

Tenured faculty members who have achieved the rank of full professor shall be reviewed every third year, and tenured faculty members who have achieved rank of associate professor shall be reviewed every second year. All other faculty will be evaluated annually. Any faculty member may request to be evaluated in any year. See section 10.210 of the CBA for specific information regarding the evaluation schedule for tenured and tenure-track faculty.

CHAIRPERSON TERM, FTE ALLOCATION, EVALUATION, AND COMPENSATION

The Chair of the School of Integrative Physiology and Athletic Training will serve a renewable term up to 5 years per the College of Health Chair Term Policy. Chairpersons are appointed by the Provost as recommended by the Dean of the College of Health. A Chairperson's term ends at the conclusion of their 5-year assignment, at a time they formally resign their Chair duties to the Dean, or are removed from the role of Chairperson by the Dean. Renewal of a Chairperson's term is subject to a Chair's interest in the position and the College of Health Dean/Provost's approval. The duties of the Chairperson are defined in the CBA document 16.220, and that administrative allocation to a faculty-Chairperson's 1.0 FTE allocation is a minimum of one-fourth release time (CBA 13.520). In accordance with CBA policy 16.240 the administrative performance of the Chairperson is subject to review at any time by the Dean. Results of any such evaluation of the administrative role of each Chairperson will be included in the next formal faculty evaluation according to CBA procedures 10.000. Chairpersons receive additional compensation in the form of a stipend during the AY based upon CBA section 13.500. Additional Chairperson compensation during the AY and FY periods is subject to the Dean's discretion and final approval by the Provost.

The School of Integrative Physiology and Athletic Training recognizes the discrepancy in workload and responsibility between Chairperson and faculty member. Therefore, when being considered for normal increment, promotion, merit, and advancement, the School will weigh service (administrative and leadership) and teaching **-OR-** service and scholarship as the primary areas for evaluation of any sitting Chairperson. Along with service, the sitting Chairperson will designate what area (teaching *or* scholarship) he or she will be evaluated. And unless there is an externally funded buyout approved by the Dean on a temporary basis, the sitting Chairpersons are required to teach the total equivalent of 3 credits each academic year even if service and scholarship are the identified areas for evaluation.

EVALUATION STANDARDS

Any evaluation of faculty members for the purposes of promotion, tenure, salary determination, or recommendation for retention, including eligible non-tenurable appointees, shall involve consideration of appropriate University requirements for faculty advancement set forth in the CBA and the Unit Standards established by the School of Integrative Physiology and Athletic Training.

UNIT STANDARDS FOR FACULTY EVALUATIONS

General Criteria for Unit Standards

I. TENURE

A. Eligibility for Tenure Application

In accordance with section 9.310 of the CBA, eligibility for tenure in the School of Integrative Physiology and Athletic Training will be based on the following:

1. Possession of an appropriate terminal degree or its equivalent. The appropriate terminal degree or its equivalent for each member of the unit will be determined at the time of initial appointment by the Dean, in consultation with the School.
2. Minimum academic rank of Associate Professor, except in unusual circumstances. A faculty member may apply for tenure and promotion to Associate Professor simultaneously. If a faculty member seeking promotion to Associate Professor and tenure simultaneously is not promoted, tenure will be denied as well (CBA 9.310).
3. Accumulation of five (5) years of credited service toward tenure (see CBA 9.310). As such, the probationary appointee may submit their tenure application during the sixth (6) year of credited employment.

B. Tenure Application

Evaluation of tenure applications shall be conducted according to Article 10.000 of the CBA, IPAT Unit Standards and Faculty Evaluation Procedures. The eligible faculty member is responsible for the initiation of the application for tenure and for providing necessary documentation. This application shall include, but not be limited to, the following (in accordance with CBA 9.320):

1. An IPR of the applicant's teaching, scholarship and/or creative works, and public service performed by the applicant during the probationary period. A cover letter, while not required, is encouraged to contextualize the applicant's teaching, scholarship/creative works, and service activities.
2. Evidence that the applicant has achieved or is in the process of achieving recognition in his/her field of competence as an independent academic beyond The University of Montana (see *Performance Indicators*, p. 7).
3. Any other information the applicant deems relevant to his/her professional development, competence, or performance.

C. Failure to Attain Tenure

If a probationary faculty member has not attained tenure at The University of Montana by the completion of his/her seventh (7th) year of credited employment, the conditions of 9.340 of the CBA will be enforced.

II. PROMOTION: Promotion in the School of Integrative Physiology and Athletic Training is based upon documentation of effectiveness and quality of work. In any evaluation for purposes of promotion and award of tenure, performance in teaching, community and university service, and scholarship/creative works are important and essential, as set forth in section 6.200 of the CBA. The blend of academic responsibility in these areas, however, may vary as the School has different expectations for each faculty position. The evaluation process will consider all accomplishments in the present rank including work accomplished at other institutions in that rank consistent with CBA sections 9.240 and 9.310. In every case of promotion, the candidate will provide a curriculum vitae and a completed IPR. A completed IPR may follow the proposed format included in Appendix A and provide evidence of achievement in teaching, scholarship/creative works, and service for the period since the last promotion, or the most recent seven (7) years, whichever is less (per CBA 10.220). In addition to documentation supporting teaching, service, and scholarship/creative works (see Appendix A), it is incumbent on the faculty member to provide any additional information that will support promotion.

A. Criteria for Promotion

In every case of promotion whether to Assistant, Associate, or Full professor, the following criteria will serve as minimum requirements, as outlined in the individual's FTE, and may or may not include:

1. Possession of an appropriate terminal degree or its equivalent. The appropriate terminal degree or its equivalent for each member of the unit will be determined at the time of initial appointment by the Dean, in consultation with the School.
2. Evidence of effectiveness and proficiency as a teacher.
3. Evidence of active and competent scholarship and/or creative works as an independent academic.
4. Evidence of active participation and impact in professional, university, and/or public service.

B. Evidence for Promotion

Evidence for achievement in teaching, scholarship/creative works, and service may be demonstrated by the documented participation in a variety of activities illustrating a commitment to furthering the mission of the School and impacting the general field of Integrative Physiology and Athletic Training at the state, regional, and/or national level. Ultimately, this should result in the applicant achieving recognition in his/her field of competence beyond The University of Montana. *For a list of suggested activity, evidence and/or documentation to support achievement in teaching, scholarship/creative works, and service, refer to "Performance Indicators", p. 9 of this document.*

The following are several examples that serve as indicators of impact, recognition, and independence as an academic:

1. Effective teaching performance as indicated by formal student evaluations, Informal appraisal (cards, letters etc.) by current and former students, past FEC and chair evaluations, and receipt of awards in recognition of teaching effectiveness and proficiency.
2. Advising/mentoring performance as indicated by informal (cards, letters etc.) appraisal and formal School advising/mentoring evaluations; FEC and chair evaluations; and receipt of awards in recognition of advising/mentoring effectiveness and proficiency.
3. Principal investigator level scholarship publication or appropriate documentation of creative works.
4. Principal investigator level scholarship/creative works efforts related to grants and/or contracts, direction of student research,

published abstracts, book reviews, authorship of position papers, active participation as editors, external publication or proposal reviewers, or professional research efforts incident to publication.

5. Participation in professional organizations or societies, receipt of awards in recognition of professional participation and accomplishments, or speaking engagements related to one's professional field.
6. Professional service demonstrated by consulting or other contributions that show impact and benefit the campus community, and/or local community, and/or the state, and/or the nation and professionally affiliated agencies, schools, etc.; service on advisory boards; participation on local governing boards; and active service on campus committees.
7. Interdisciplinary teaching, service, and/or research/creative activity related to above points (1) through (6).

C. Specific Criteria for Promotion

In accordance with CBA 10.110, the following requirements must be met regarding each of the respective types of advancement:

1. Promotion to Assistant Professor requires possession of appropriate terminal degree or equivalent. The appropriate terminal degree or its equivalent for each member of the unit will be determined at the time of initial appointment by the Dean, in consultation with the School. Promotion to Associate or Full Professor, however, requires additional criteria outlined below:
2. Promotion to Associate Professor:
 - a. Four (4) or more years of full-time service in rank as Assistant Professor are required prior to the date of promotion (application may be made during the fourth year in rank) except in unusual circumstances.
 - b. 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.
3. Promotion to Full Professor:
 - a. Five (5) or more years in the rank of Associate Professor are required prior to the date of promotion (application may be made during the fifth year) except in unusual circumstances.

- b. Evidence that the applicant has achieved teaching and service recognition in his/her field of competence beyond The University of Montana.
- c. No faculty member may be promoted to full professor on the basis of teaching and service alone. An applicant for Full Professor must provide demonstration of distinguished performance in scholarship and publication or appropriate public recognition for creative works beyond The University of Montana. It is understood that impact and immersion in the profession will be higher than that required for promotion to Associate Professor.

III. MERIT: According to Article 10.110 of the CBA, merit for tenure-track faculty is defined as above normal performance in at least two (2) of the three (3) areas of teaching, scholarship/creative activity, or public service; -OR- as outstanding performance or special recognition in at least one (1) of these areas and normal performance in the remaining area or areas of assigned duties. Merit represents strong contributions to School and University goals beyond normal performance expectations and thus clearly deserves financial recognition. The evaluation of above normal performance and outstanding performance will be determined by the stature of the scholarship/creative activity, and/or teaching activities, and/or professional service beyond normal performance and the quality of contributions to his or her particular discipline, respectively. The FEC, in order to distinguish 'outstanding' from 'above normal' performance in each category of teaching/advising, scholarship/creative works, and service, will take the magnitude of the accomplishment/s into account along with the time frame represented in the merit request. According to article 10.220 of the CBA, evidence for merit award will include the time since the documentation was prepared for the last granted merit or promotion, or the most recent seven (7) sequential years, whichever is less (per CBA 10.220). Any faculty member can request merit or can be recommended from within the Unit by the Faculty Evaluation Committee or School Chairperson. In addition, the Dean may recommend the faculty member for merit.

The following descriptions are intended to assist evaluators in determining meritorious performance in teaching, service, and scholarship. The examples below do not imply automatic meritorious consideration, but rather indicators of heightened performance beyond normal parameters. The ultimate measure of meritorious performance will be in the frequency, consistency, and integrity of above normal or outstanding performances in each of the three areas.

A. TEACHING

Normal teaching shall consist of teaching lower and upper division courses according to one's expertise. The courses shall be taught responsibly as indicated by student evaluations and teaching materials. The School of IPAT values General

Education and expects that assigned faculty will teach General Education courses as need arises and based upon faculty workload.

Teaching shall be considered *Above Normal* if one's teaching contributions exceed the normal standard. For example, teaching may be considered Above Normal if one consistently receives "very good" to "excellent" evaluations, although student evaluations should not be used exclusively in this determination. Moreover, faculty that take on extra tasks such as the undertaking of new course preps or engaging students in service, or related professional mentoring (e.g., outreach, research, etc.) related to student course work should also be considered above and beyond the student evaluation metrics.

One's teaching shall be considered *Outstanding* if teaching contributions lead to an exceptional teaching award/honor and/or far exceed the normal teaching standards. For example, teaching may be considered Outstanding if one undertakes comprehensive program curricula development, or receives uniformly excellent student evaluations for the period of review.

B. SERVICE

Normal service shall consist of engaging in School service (e.g., serving on School committees), in addition to service activities performed for the College and University.

One's service shall be considered *Above Normal* if in addition to normal service, one undertakes considerable additional service such as serving on very demanding & time-consuming committees, or serving as the School Chair or undertaking a large amount of School service, or serving on community & state professional committees.

One's service shall be considered *Outstanding* if one displays model professional, School and/or University service. This ranking shall be reserved for an exceptional service award/honor or exceptional amounts of service. For example, serving on prestigious national or international professional committees, or serving on work intensive committees for a protracted amount of time, or receiving external funding for programs that serve student and/or other populations, or developing and/or directing university programs for student populations as an addition to regular fulltime FTE faculty duties.

C. SCHOLARSHIP AND CREATIVE ACTIVITY

Normal scholarship and creative activity shall consist of engaging in research

and/or creative work and publishing and/or publicly presenting one's research or the products of one's creative activities. While evidence of collaborative scholarship is expected within a faculty member's portfolio, evidence of independence (e.g., being the principal investigator and/or corresponding author) are paramount to individual career success.

One's scholarship and/or creative activity shall be considered *Above Normal* if one exceeds normal standards in scholarship and/or creative activity for producing, publishing, or presenting their work, or developing multiple creative products, or receiving grant awards, or publishing or presenting in a prestigious venue.

One's scholarship and/or creative activity shall be considered *Outstanding* if one far exceeds normal standards by receiving an exceptional scholarship/creative activity award/honor or by engaging in scholarship and/or creative activity at a much higher rate than is typical of one's subfield. For example, authoring projects of greater scope (e.g., book), or receiving extramural grant awards from federal or foundation funding sources, or publishing or presenting in prestigious venues (e.g. national and international) indicating superlatively high regard from peers in one's subfield.

IV. PERFORMANCE INDICATORS: Documentation of performance indicators in each evaluation area will vary by faculty member and discipline. These lists constitute general guidelines, as the School does not wish to constrain faculty endeavors that enhance the mission of the University. It is to be noted that the hierarchal and represented values of these lists are subjective to the diverse disciplines in IPAT. When considering the evidence of achievement presented for performance, the unit charges the candidate to describe the quantity and quality of their professional work and elucidate on their IPR, such as a cover letter to the FEC committee and attached documentation. Evidence therefore includes, but is not limited to, the following:

- A. TEACHING (in no particular order)
 - 1. Effective teaching and advising performance as indicated by formal student evaluations
 - 2. Performance of students in the event a student receives academic or service accolades, financial or otherwise, as a direct result of participating in work accomplished in a particular faculty member's course. Unsolicited written feedback from current and former students such as letters, emails etc.
 - 3. FEC, Chair, and Dean evaluations for the period under review.
 - 4. Testimony of effective teaching by team-teaching associates
 - 5. Student performance – positive feedback by student-teacher and/or service learning supervisor who observed a particular faculty member's student
 - 6. Advisory board or committee appointments that emphasize teaching effectiveness
 - 7. Honors, awards and commendations for teaching excellence

8. Supervision of undergraduate and graduate independent study/research credits
9. Supervision of Teaching and Graduate Assistants
10. Development of new courses
11. Evidence of mentorship in the professional development of students (student participation in conferences, symposiums, Internships, professional employment, etc.)
12. Inclusion of service learning projects in the classroom
13. Active participation in continuing education activities or other training/demonstration projects that focus on the improvement of teaching
14. Participation in faculty seminars and colloquia
15. Advising/mentoring performance as indicated by formal advising evaluations, opinions of former advisees, appraisal by IPAT Undergraduate Advising Coordinator, peer and chair evaluations, and receipt of awards in recognition of advising/mentoring effectiveness and proficiency
16. Supervision and/or participation in graduate level thesis and/or professional paper projects
17. Supervision and/or participation in graduate level comprehensive exams
18. Other evidence of teaching and advising effectiveness

B. SCHOLARSHIP AND/OR CREATIVE WORKS (in no particular order)

1. Authorship of books, monographs, and contracted or officially sanctioned position papers for professional organizations where the faculty member serves in the role of principal and/or corresponding author.
2. Book reviews and articles in refereed journals; published abstracts of unpublished books and articles where the faculty member serves in the role of principal and/or corresponding author.
3. Manuscripts of unpublished books and articles where the faculty member serves in the role of principal and/or corresponding author.
4. Editor or co-editor of books, professional journals or other professional manuscripts, periodical, and documents
5. Authorship of book chapters
6. Participation on editorial review boards or invited reviewer for research/paper proposals for presentation at professional societies
7. Principal Investigator of research or project grants
8. Co-Principal Investigator or Co-Investigator of research or project grants
9. Contractor of research or project grants
10. Production of professional and discipline-specific creative works such as digital anthologies and books, documentaries, videotapes, movies, canned electronic demonstrations, DVD's, software, web sites, Internet, and other technologically mastered productions
11. Research sponsorships and fellowships
12. The supervision and direction of published student research or scholarship
13. Presentations and workshops, either invited or refereed for acceptance at state, regional, national and international meetings of professional societies

14. Research awards
15. Evidence of continued professional growth through attendance at programs or classes offering continuing education credits, or participation in other formal educational endeavors offering a scholarship component
16. Letters of support from colleagues, collaborators, and knowledgeable audiences; professional critiques and reviews of scholarship endeavors
17. Other evidence of scholarship/creative works (i.e., podcasts, outreach media campaigns, etc.)

C. PUBLIC, PROFESSIONAL AND UNIVERSITY SERVICE (in no particular order)

1. Support letters, reports or evaluations by professional colleagues and service recipients regarding the quality, and impact.
2. Participation as executive officers or elected representatives in professional organizations and societies; service on advisory boards; participation on local, state, and/or national governing boards
3. Professional service demonstrated by consulting or other outside vocation for agencies, communities, schools, etc.
4. Designing and implementing in-service opportunities; organizing seminars and workshops for professionals; serving as consultant for the development and implementation of service-oriented activities in the community
5. Honors, awards, commendations and/or letters of appreciation for service activities and contributions
6. Support letters from students and student organizations regarding service provided
7. Professional contributions to public welfare consistent with the mission of the School
8. Active and productive participation on School, College of Health, or University committees with accordance of article 6.200 in the CBA.
9. Participation as an advisor/sponsor, mentor, or guest speaker for student organizations
10. Participation in evaluation or accreditation team visits
11. Writing and preparation of research and project grant proposals
12. Clinical Practice
13. Developing, supporting, and maintaining relationships with clinical affiliation sites.
14. Other evidence of public, professional, and university service

TENURE REVIEW

In accordance with article 17.000 of the CBA, tenure review will be initiated when a tenured faculty member has received a less-than-normal salary increment for three (3) successive years. The procedures for tenure review will be in accordance with article 17.100 of the CBA.

PROBATIONARY APPOINTMENTS AND NON-REAPPOINTMENTS

In accordance with Article 9.230 of the CBA, a probationary appointee has no right to reappointment, and a probationary appointment shall automatically expire at the end of the specified term in the absence of a written reappointment signed by the President. The President may request and review, but shall not be obligated to adhere to, recommendations from the unit, dean, and the Provost regarding questions of renewal of probationary appointments.

In cases of non-reappointment for financial or programmatic considerations the probationary appointee will be so notified in writing. Written notice of non-renewal of a probationary appointment shall be mailed or given by the President or his/her designee at least four (4) month prior to the expiration of the first appointment, seven (7) months prior to the expiration of the second appointment, and twelve (12) months prior to the expirations of the third or later appointment.

NON-TENURABLE APPOINTMENTS

Non-tenurable appointments include five types: lecturers, adjunct faculty at any rank, research faculty at any rank, clinical faculty at any rank, and visiting faculty at any rank.

Non-tenurable appointments must be recommended by the School faculty based upon Unit Standards and policies to ensure that the appointees have the requisite credentials to teach and/or conduct research in the School. The School of Integrative Physiology and Athletic Training evaluates all non-tenured faculty members annually, according to established procedures. The evaluations must reflect assignments and expectations defined within that individual's assigned FTE. Non-tenurable faculty with no research and creative activity or service requirements will not stand for evaluation in those areas, but the evaluations will acknowledge such professional activities when actually performed. As outlined in Article 9.220 of the CBA, at the time of appointment or reappointment, each faculty member shall be provided by the employer with a written agreement that specifies rank, salary, and other terms and conditions of employment. The FTE distribution for non-tenurable appointments will be reviewed annually by the School Chair. Feedback will be provided to the faculty member and Dean through the Individual Performance Review process mechanism (SEC, FEC and Chair). FTE distribution/redistribution for the coming year will be discussed/negotiated between the School Chair and faculty member, and then approved by the Dean. The chairperson, in cooperation with the Dean, will determine if a letter of reappointment is appropriate.

Non-tenurable faculty members should review University Policy 350 for additional information regarding categories of non-tenurable appointments as well as the rights and responsibilities of non-tenurable appointments.

In accordance with 3.100 of the CBA, the Board of Regents (Board) recognizes the University Faculty Association (UFA) as the exclusive bargaining representative for all persons in the bargaining unit. The bargaining unit includes non-tenurable faculty who are term-by-term appointments, who are .5 FTE or greater for two or more successive semesters, excluding summer, concurrent with the second semester appointment. Any semester (excluding summer) without employment shall constitute a break in service for the purpose of determining consecutive employment.

The rights of non-tenurable appointees in the School of Integrative Physiology and Athletic Training, who are members of the bargaining unit, are the same as outlined in section 9.110 of the CBA.

A. Non-Tenure Track Advancement Criteria

Lecturer may or may not have a terminal degree, depending upon assignment and background or experience, subject to annual reappointment at the University's discretion, with one semester's advance notice of intent not to reappoint.

Postdoctoral Scholar has a doctoral degree in the discipline and will conduct research under the supervision of a faculty member holding professorial rank;

[Adjunct, Visiting, Research, or Clinical] Instructor has the qualifications for Instructor stipulated in the CBA;

[Adjunct, Visiting, Research, or Clinical] Assistant Professor has the qualifications for Assistant Professor stipulated in the CBA;

[Adjunct, Visiting, Research, or Clinical] Associate Professor has the qualifications for Associate Professor stipulated in the CBA; and,

[Adjunct, Visiting, Research, or Clinical] Professor has the qualifications for Professor stipulated in the CBA.

1. To Assistant Professor

Requires possession of the appropriate terminal degree or its equivalent.

The appropriate terminal degree or its equivalent for each member of the unit will be determined at the time of initial appointment by the Dean, in consultation with the School.

2. **To Associate Professor:**

Except in unusual circumstances, four (4) or more years of full-time service in rank as assistant professor are required prior to the date of promotion (application may be made during the fourth year in rank), and possession of the terminal degree in the appropriate discipline is required consistent with applicable unit standards. 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.

3. To Professor:

Except in unusual circumstances, five (5) or more years of full-time service in rank as an associate professor are required prior to the date of promotion (application may be made during the fifth year) and possession of the terminal degree in the appropriate discipline is required consistent with applicable unit standards. The character of the service in rank as associate professor shall be such that there is a clear demonstration of professional growth and an increasingly valuable contribution to the University.

4. Lecturers

Persons appointed as members of the faculty with duties devoted primarily to teaching, subject to reappointment annually at the University's discretion. Lecturers can qualify for salary increases on the basis of performance. Lecturers may engage in service activities as part of assigned duties.

A person who has attained distinction in the field may receive the title of Distinguished Lecturer at an appropriate salary per UM policy 350.

FACULTY EVALUATION OF FACULTY ON BUYOUTS

The School of Integrative Physiology and Athletic Training recognizes the potential value of making available to outside agencies the professional competence and technical knowledge of IPAT faculty members. Full-time employment by the University, however, shall be considered the primary employment of IPAT faculty who acquire external support. As such, all activities associated with external funding shall not impair a faculty member's educational effectiveness or otherwise interfere with his/her professional responsibilities to the University. In all cases, every person in the bargaining unit is at one time: (1) a teacher, (2) a member of the faculty of the University, and (3) a scholar. By virtue of his/her position in the University, the individual shares all three of these functions, each of which is of great importance (CBA, 6.200).

Therefore, any evaluation of faculty members for the purposes of promotion, tenure, merit, or recommendation for normal increment shall include consideration of appropriate University requirements for faculty advancement set forth in the CBA and the Unit Standards established by the School of Integrative Physiology and Athletic Training.

As per the IPAT School's Buyout Policy, buyout funding (acquisition of research funding or funding from various external sources) can be used to provide release time from coursework and advising duties. Based upon individual buyout proportions, however, each faculty member buying out will be evaluated based on the following guidelines:

- (1) must be evaluated each review period on at least one course or courses, the total equivalent of 3 credits, (excluding independent study, thesis and research credits) provided the individual faculty member has at least a 3-credit hour teaching assignment within their FTE.
- (2) must demonstrate continued participation in the work of the unit and the institution (service)

- (3) must contribute to IPAT student progress and welfare, which will include some level of participation in mentoring and advising and/or graduate student thesis/professional paper/comprehensive exam committees
- (4) During the evaluation process, an explanation of the buyout, and what courses and/or advising were covered by the buyout, will be submitted with the faculty member's IPR for review by the FEC and Chair.

PROCEDURES FOR FACULTY EVALUATION

In accordance with article 10.210 of the CBA, tenured faculty members who have achieved the rank of full professor shall be reviewed every third year, and tenured faculty members who have achieved the rank of associate professor shall be reviewed every second year. All other faculty will be evaluated annually. Any faculty member may request to be evaluated for tenure, promotion, merit or normal salary increment in any year. The responsibility for providing evidence and documentation that their has met the School's criteria for advancement and salary determination lies with the faculty member.

The Faculty Evaluation Committee (FEC) will review all available submitted material and provide an evaluation and comments for each faculty member reviewed. Each faculty member will receive a copy of his or her recommendation evaluation. A faculty member may respond to their evaluation review in writing during the time frame outlined in sections of the CBA dedicated to Unit Standards and Faculty Evaluation Procedures (Section 10). The Faculty Evaluation Committee, the School Chairperson or the Dean may request and consider any evidence from any source, including the faculty member to be evaluated, provided that any evidence relied upon for evaluation purposes shall be incorporated into the record and the faculty member shall be afforded an opportunity to respond to it. As provided in Article 10.240 of the CBA, upon request, a faculty member being evaluated shall be permitted to personally address the Faculty Evaluation Committee regarding his/her evaluation.

The evaluation of scholarship and creative works will be affected by the stature of the publication, the nature of the materials published and the significance of their contributions to the profession (see Appendix A for proposed IPR format).

1. Individual's Performance Record – October 15

In accordance with 10.220 of the CBA, the documentation or evidence of performance required by the Unit Standards and the University shall be prepared by every member of the Bargaining Unit, including non-tenurable appointees represented by the Bargaining Unit, in sequentially numbered pages which incorporate exhibits by reference and are signed on the last page by the person to be evaluated (refer to Appendix A for proposed format). The

individual shall submit the documentation to the School of IPAT Chairperson by October 15.

2. Student Evaluation Committee – October 15 (pertaining to CBA 10.230)

The Student Evaluation Committee (SEC) shall consist of at least three (3) but not more than seven (7) students who are majors and/or graduate students in the School of Integrative Physiology and Athletic Training and shall include one (1) faculty observer with all rights of participation except voting. The faculty observer shall be nominated and elected from among the tenured or tenurable (i.e., tenure-track) members of the bargaining unit in the School. The student committee members shall be nominated by faculty members and appointed to the committee by the School Chairperson by September 15. The committee shall elect a chair from among its voting members.

The committee shall review the teaching and advising effectiveness of faculty members in the bargaining unit. The School shall either use its own course evaluation form, an existing form or a form prepared by the UFA Administration Committee and shall make completed forms available to the committee by September 20. Each faculty member must have at least one course evaluated each semester they teach and provide the results to the SEC. The committee shall prepare a written summary evaluation of the teaching and advising effectiveness of each faculty member under review. The chairperson of the SEC and the faculty member being evaluated shall sign each written evaluation by October 15. A faculty member may append a response to the SEC report.

3. Faculty Evaluation Committee – November 15 (pertaining to CBA 10.240)

The School of Integrative Physiology and Athletic Training Faculty Evaluation Committee (FEC) is a peer-review committee tasked with the determination of tenure and promotion decisions. Accordingly, the FEC will consist of three (3) IPAT faculty members and one (1) alternate that is not currently serving as the School of IPAT Chairperson. Service on the FEC is a three-year (3) commitment and is determined by nomination and election. The committee is staggered so that only one member's term expires each year. During a scheduled faculty meeting at the beginning of each new academic year, names of eligible faculty (tenure-track) IPAT faculty members are placed in nomination for service on the FEC. A vote by tenure-track IPAT faculty members is conducted to determine, by majority, what nominee will replace the retiring member on the FEC. A follow-up nomination and election process will be conducted to select an alternate. The alternate will serve on the committee for one (1) year only. The alternate will serve as an FEC member when another member of the FEC is being evaluated or when any other circumstance dictates

his or her participation. In the event two or more members of the FEC must be replaced, the nomination and election process described hitherto will be repeated until the FEC is fully elected, followed by a separate nomination and election process to select the alternate.

Two of the three participating FEC members must be tenured and the third tenurable (i.e., tenure-track). The committee shall elect a Chairperson by majority vote from among the committee membership. The FEC will always consist of three voting members. When a member of the FEC is being evaluated, the alternate member will constitute the third member. The committee shall apply the unit and CBA standards to review the performance of each eligible faculty member and make a written recommendation with justification signed by the committee chairperson which shall, where appropriate, specifically address: (1) retention, (2) salary increment, (3) promotion, and (4) tenure, and which shall be forwarded to the School Chairperson and the Dean by November 15. In addition to the individual recommendations, the FEC shall prepare and append a summary of those who have been recommended by the committee for promotion, merit increase, or tenure respectively. Faculty members under review, as well as those serving on the FEC, should familiarize themselves with Article 10.240 of the CBA regarding confidentiality, solicited and unsolicited materials, appeals, and other matters of protocol that support candid professional assessment and the rights of faculty under review.

4. School Chairperson's Recommendation – December 15 (pertaining to CBA 10.250)

Based on the approved unit standards, the CBA, and consideration of the evidence submitted by the faculty member under review, the SEC recommendation, the FEC recommendation, and any additional evidence solicited or received and placed in the evaluation report, the School Chairperson shall prepare and sign a written evaluation for each faculty member in the unit, including non-tenured appointees, which, where appropriate, shall specifically address: (1) retention, (2) salary increment, (3) promotion, and (4) tenure. The Chairperson may append a written statement of his/her professional opinion and recommendation regarding matters that they may deem to be relevant to the performance or advancement of the individual evaluated. The faculty member shall be given the opportunity to respond in writing to this professional opinion.

The School Chairperson shall make the record of each evaluation available to the respective faculty member for his/her review and signature. Each recommendation shall be signed by the faculty member to attest that they have read it. The faculty member's signature on the SEC, FEC and the Chairperson's recommendations does not signify the faculty member's endorsement of the recommendations. The Chairperson shall then forward a copy of the complete

record – IPR, SEC recommendation, FEC recommendation, School Chairperson recommendation, and if submitted, the professional opinion with faculty member’s response, and any additional exhibits or evidence relied upon or incorporated by reference except course evaluation forms – to the Dean by December 15. In addition, the School Chairperson shall prepare and append a summary list of those the chairperson has recommended for promotion, merit increase, or tenure, respectively. The names on the list of recommendations for merit increase will be ranked in order of priority by the chairperson. On or before December 15, the School Chairperson shall inform the faculty that merit rankings are available and shall provide individual rankings to specific faculty members seeking a Merit designation at the request of that faculty member.

5. Dean’s Evaluation and Recommendation – February 15 (pertaining to CBA 10.260)

Based on the CBA, unit standards, and the evaluation record, the Dean shall prepare an individual written evaluation and recommendation for each faculty member regarding retention, salary increment, promotion, and tenure, where appropriate for the individual being considered.

Faculty members under review should review Article 10.260 of the CBA for thorough description of the Dean’s evaluation and recommendation process. Faculty members seeking to submit a written appeal to the Dean regarding any aspect of their evaluation record or process should refer to Article 10.270 of the CBA.

6. Appeals and Responses

Any faculty member can appeal any personal evaluation from the FEC, and/or Chair, and/or Dean in accordance with Articles 10.240, 10.250, 10.270, and 10.280 of the CBA. Faculty members may provide written response to, although cannot appeal, SEC evaluations. The written response is placed in the faculty member’s file along with the SEC evaluation and moves forward to the FEC, Dean, and Provost for consideration during the respective evaluation period.

RESTRAINTS ON EVALUATION AND APPEAL

1. Conflicts of Interest: Refer to section 12.300 of the CBA.
2. Absence of Student Participation: Neither error nor omission of student participation in any evaluation may constitute grounds for a grievance. The evaluation procedure may proceed without participation by a School Student Evaluation Committee (per CBA 10.235).
3. Appropriate Remedial Action: The normal remedy for any prejudicial errors, omissions, or defects in the process of evaluation of faculty for advancement shall be to remand and properly re-do the process to cure the

defect. Other matters of resolve, including what conditions are considered grievable and arbitrable, are described in Article 10.320 of the CBA.

APPENDIX A

SCHOOL OF INTEGRATIVE PHYSIOLOGY AND ATHLETIC TRAINING

Proposed Format for Individual Performance Record

1. Teaching
 - a. Courses – for each course taught, cite: semester taught, title, course number, credit hours, type of course (if assisted by TA or if course is team taught, indicate only that time for which faculty member is actually involved – if course is team taught, divide enrollment by number of faculty involved.
 - b. Student mentoring (i.e, DHC theses, independent research, graduate comprehensive exam processes, graduate committee membership, academic advising, professional papers, theses, etc.)
 - c. Other teaching/graduate student advising/mentoring activity
 - d. General Education- the School values General Education and expects that assigned faculty will teach General Education courses as need arises and based upon faculty workload.

2. Professional Service
 - a. University (cite committee, task force, or other contributions indicating the level of activity – School, College, or University – and, wherever possible, indicate whether time intensive and agenda rigorous)
 - b. Continuing education and extension activities (cite place, title of course, workshop, etc., enrollment and other relevant data)
 - c. Professional association memberships
 - d. Professional association service (cite offices held and any special service activities connected with association participation)
 - e. Professional publications (cite books, reports, testimony, interviews, depositions or other contracted or invited publications which are client-oriented)
 - f. Public service (cite community, state, regional, or national service activities; cite participation on advisory and governing boards or commissions; cite receipt of honors, awards or project grants of a client-oriented nature)
 - g. Other service activities

3. Scholarship and/or Creative Works

- a. Books published (provide exact citation of author, title, publisher, date)
- b. Chapters in books; indicate whether original work or re-print
encyclopedia entries; anthologies; lab manuals
- c. Articles in refereed and non-refereed journals (provide exact citation of author, title, journal, date, pages and attach copy of article); articles, editorials, letters to the editor and other contributions in other professional periodical
- e. Book reviews (cite full bibliographic detail); cite participation on editorial and proposal review boards
- f. Published article reviews (cite journal or periodical title, pages, date)
- g. Papers presented at meetings of scholarly societies (cite authors, title meeting, and date)
- f. Published abstracts (cite authors, source, date); encyclopedia entries; anthologies; lab manuals
- h. Attendance at programs offering continuing education credits, classes or other formal education activities specifically focusing on scholarship and/or creative works
- g. Participation on panels or symposia, (indicate level of participation)
- h. Research and project grants, contract, awards, fellowships, or honors (cite authors, titles, agency, and funding)
- i. Other scholarship and creative works that contribute to the body of knowledge, but not listed above (i.e., podcasts, outreach media campaigns, etc.)

In addition to the IPR, it is suggested that faculty members include documentation to support scholarship/creative works, service, and teaching activities. Current practice at The University of Montana includes providing title pages or other appropriate identifiers for documentation (instead of complete/full publications, written reports, grant documents, etc.) of scholarship/creative works, teaching activities, and professional service cited in the IPR. If any faculty member should have questions about any aspect of organizing evaluation materials, they should request assistance from the acting School Chairperson, the administrative assistant and/or veteran faculty member.