




**UNIT STANDARDS REVIEW  
SIGNATURE FORM**


Department of: School of Physical Therapy & Rehab Science  
Year: 2023

1) Department Chair:

  
\_\_\_\_\_  
Signature


10/9/2023  
Date

2) Dean:

  
\_\_\_\_\_  
Signature

10/9/2023  
Date

3) Chair, UM Unit Standards Committee:

  
\_\_\_\_\_  
Signature

Oct 10, 2023  
Date

4) Provost and Vice President for Academic Affairs:

  
\_\_\_\_\_  
Signature

January 23, 2024  
Date

**SCHOOL OF PHYSICAL THERAPY AND REHABILITATION SCIENCE  
COLLEGE OF HEALTH**

**UNIT STANDARDS FOR FACULTY EVALUATION & ADVANCEMENT**

*INTRODUCTION*

These standards are consistent with the general University guidelines for faculty advancement as outlined in the Collective Bargaining Agreement 10.000 and have been approved by the faculty of the School of Physical Therapy and Rehabilitation Sciences. The purpose of the Unit Standards is to provide a framework for the evaluation of faculty governed by the *Collective Bargaining Agreement (CBA)* as it relates to specific University and school wide responsibilities. Please note that faculty members with less than 0.5 FTE or who are designated as contract professionals are not evaluated through the faculty evaluation process. Promotion, award of tenure, salary determination, or recommendation for retention, performance in teaching, service, and scholarship/research are each important and essential, as set forth in section 6.200 of the CBA. The distribution of academic responsibility may vary for each faculty position. Overall, a clear demonstration of professional development, and increasingly valuable contributions to the University, and a discernable commitment to furthering the mission of the school is expected of all faculty. These Unit Standards and procedures are intended to be in addition to, and consistent with, those provided in the current CBA. If University Standards and Unit Standards conflict with each other or are otherwise inconsistent, the University Standards shall control all interpretations and applications. University Standards shall be the minimum standards. Our unit may impose more stringent standards.

**Vision**

Driving excellence in physical therapy education, research, and movement centered clinical practice.

**Mission**

The School of Physical Therapy prepares graduates to be entry-level physical therapists who embrace life-long learning, professional and ethical behaviors, and cultural humility resulting in patient care that is outcome and evidence based, compassionate, and attends to the knowledge, skill, and emotional needs of the public we serve. We are committed to advancing the science of physical therapy that positions physical therapists as vital members of healthcare teams that serve people from all backgrounds across the lifespan.

**Preamble**

Accreditation standards and the Collective Bargaining Agreement (CBA) provide guidance and governance for this unit standards document. Professional obligations to the State of Montana, the physical therapy profession, our community, and the operational function of our University and its Mission define a meaningful portion of our job duties and expected performance. Individuals holding academic appointments are members of the faculty of the University of Montana and are expected to carry out the principal assignments and responsibilities of the position consistent with the overall mission and program of the University and the College of Health. These duties include the academic arenas of teaching, scholarship, and service.

**Determination of General Core Faculty Expectations and Considerations**

The School of Physical Therapy and Rehabilitation Science core faculty encompasses several different positions. The trajectory towards advancement and, as applicable, tenure, emphasizes relative contributions in teaching, scholarship and service as described loosely by the following operational definitions. Specific workload distributions are approved by the Dean under advisement of the Chair.

- **Tenure-track:** Primary role is to engage in scholarly activities. The rigors of research and requirements of funding agencies are such that a tenure-track faculty member needs a large stake in research activity. A substantial portion of their workload is also dedicated to teaching. Service loads are modest to start and the effort and leadership roles in service activities should grow with experience and promotion.
- **Clinical Professor – Non-tenure track Clinical Education track:** Primary role is to manage and develop our clinical education program. These faculty members also spend a substantial portion of their workload dedicated to teaching, with a smaller workload proportion dedicated to scholarship. Service roles are larger than tenure-track faculty because of administration of the clinical education component of our program, in addition to other service roles.
- **Clinical Instructor Track:** Primary role is dedicated to clinical instruction, clinical practice, followed by teaching with a small portion of their FTE dedicated to research and service. Clinical instruction and clinical practice make up the bulk of this faculty member's workload.
- **Chair:** The person who serves in the chair role is a member of the core faculty of the School. The CBA (CBA 13.530) stipulates a minimum of 0.25 FTE towards administrative duties. Additional service FTE is typical to achieve other school, college, university, and professional service objectives. Designated research effort is required in order to maintain a scholarly agenda to achieve at least the normal standard of tenure track positions. Teaching FTE is generally less than a tenure-track faculty member. Working knowledge of the school's operations is required of the chair to support the school's research, teaching, service, administration, and clinical practice.

The effectiveness of the School of Physical Therapy and Rehabilitation Science is dependent upon the collective contributions of the faculty in their respective areas of expertise and as elucidated in their contractual expectations. All faculty members are expected to actively engage in the work of the Unit in a professional, respectful, and collaborative manner with their colleagues as part of their normal work performance (consistent with CBA 6.200). If Unit Standards are changed during an evaluation period for any faculty member, such faculty member will have the choice of using either the Unit Standards effective at the time of hire, or those currently effective, when applying for tenure and/or promotion to Associate Professor or Clinical Associate Professor. However, after faculty members are tenured or promoted to Clinical Associated Professor ( i.e., in the case of non-tenurable faculty), only the Unit Standards in effect at the time of evaluation will be used (CBA 10.200).

Expectations and performance standards for faculty members are derived from a variety of sources and these key documents include, but not limited to, the following:

- 1) Faculty member's offer letter,
- 2) Annual Faculty Plan formed in partnership with the School's Chair (**Appendix1**),

- 3) Recommendations and reviews completed during the faculty evaluation process,
- 4) Accreditation evaluation standards and directives.

Each faculty member, in partnership with the Chair, plays an active role in determining their workload, effort, and duties during their annual planning meeting. The Annual Faculty Plan should be completed, reviewed, and signed by both the faculty member and the chair each year prior to the start of fall semester. The Chair's Annual Faculty Plan will be completed with the assistance and collaboration of a tenure-track faculty member for our program chosen by the Chair or assigned by the Dean.

### **Faculty Evaluation Overall Guidance**

The faculty evaluation process and Unit Standards provide reasonable and explicit performance expectations that help guide decision making within our School and align our work output to our School's mission statement. Faculty evaluations should encourage faculty development. Each faculty member shares their goals or future plans as part of their individual performance review (IPR) and/or Annual Faculty Plan. The faculty member and the faculty evaluation committee (FEC) should include objective and reasonable comparable standards and/or prior precedent in their narratives to support their performance categorizations for Teaching, Research, and Service items. Faculty members will receive a FEC recommendation that includes both summative and formative feedback as a part of shared governance and collaborative faculty group, and, when indicated, provide a suggested action plan for growth.

### **Faculty Evaluation Committee (FEC) Purpose & Processes**

The FEC will provide peer review and evaluation of the performance of each faculty member in the unit per the schedule as outlined in the CBA 10.210. The FEC is responsible for evaluating the performance record of all tenurable and clinical faculty who have an FTE of  $\geq 0.5$ . In addition to evaluating the Chair's performance as a regular faculty member, their performance in the completion of the School's administrative responsibilities will also be evaluated concurrently as scheduled as a regular faculty member.

Composition of the FEC - The FEC is a committee of the full faculty who are covered by the CBA. The School Chairperson may not serve on FEC (CBA 10.250). All full faculty who are covered by the CBA participate in the FEC meetings, but they will be excused from discussion of their own record or when a conflict of interest exists (CBA 10.310). All faculty members of the FEC can vote for salary increment decisions, but only tenured or tenure-track faculty are able to vote on tenure and promotion decisions (CBA 10.240). The FEC of the School of Physical Therapy and Rehabilitation Sciences shall consist of at least three faculty who are tenured or tenurable. Preference is for the Chair of the FEC to be tenured.

In the event that at least three tenured/tenurable faculty members from the School are not available to participate in the FEC, then an outside person will be required to serve on the FEC. The FEC chair may elect to add a member outside of the School at their discretion using the following criteria:

- Served as a Univ. of Montana faculty member for  $\geq 5$  years;
- Preferably Tenured;

Any member of the FEC may nominate a qualified outside person to serve on FEC. If there is more than one nominee, the FEC will vote to approve the nominee; successive votes of the FEC will be taken until one nominee receives a majority of the vote.

One student observer with all rights, save voting, shall be appointed by the FEC chairperson. The student observer does not represent the student evaluation committee (SEC) and cannot be a member of the SEC. (CBA 10.240).

Consistent with 10.210 of the CBA, tenured faculty members who have achieved the rank of Full Professor shall be reviewed triennially, and tenured faculty members who have achieved rank of Associate Professor shall be reviewed biennially. All other faculty will be evaluated annually. Any faculty member may request to be evaluated in any year and the Chair can request for a faculty member to be evaluated in any year.

All timelines and procedures will be in accordance with those outlined in the CBA:

<b>Timeline</b>	<b>Process</b>	<b>Notations</b>
05/01	Faculty applicants that require external letters will supply the FEC Chair with a list of names and contact information for reviewers. In addition, the applicant must provide their CV; a summary of achievements; and a description of their role assignment/allocation of FTE for their review period.	Procedures and details for when and who might be offered for letters is detailed below. The faculty member is responsible for completing the task of providing information to the FEC Chair. The FEC Chair is responsible for contacting those on the reviewer list and obtaining letters.
9/15	Possible conflicts of interest are filed with UFA-Admin. Committee (CBA 10.310). The SEC is formed and tasked with duties by the FEC chair.	The Administration determines no later than 10/10 if a conflict of interest exists (see CBA 10.310).
10/15	Each faculty who are evaluated will indicate in a cover letter with their Individual Performance Record (IPR) (1) the period to be evaluated, and (2) whether the faculty member is requesting a normal salary increment, merit, promotion and/or tenure. Recommendations for promotion, merit consideration, or outstanding performance award may be initiated by the individual, the FEC, another faculty member, the School Chairperson or by the Dean.	It is the responsibility of all faculty members to maintain a record of the quantity and quality of their achievements and to make this record available to the FEC. Faculty are encouraged, but not required, to submit their IPR according to the format recommended by the FEC. It is the individual faculty member's responsibility to ensure accuracy of their IPR. . Once submitted to the FEC, the faculty member is only permitted to add to, alter, modify, delete or remove documents: <ol style="list-style-type: none"> <li>1) Updating the status of material in support of tenure that was unknown at the time the IPR was submitted;</li> <li>2) Responding to a reviewer request for additional materials;</li> <li>3) And/or the regular appeals process identified in CBA 10.240 and 10.250.</li> <li>4) and 10.270</li> </ol>

11/15	<p>The FEC report is provided to the School Chair or designate if there is a conflict of interest.</p> <p>The Chair will review the IPR, the FEC evaluation, the SEC evaluation and recommendation, the Evaluation of Progress, any other supporting documents (contract and workload assignment), and complete a written evaluation and recommendation as per the CBA.</p>	<p>Within ten (10) working days of receipt of the recommendation from the Faculty Evaluation Committee, the faculty member may submit a written appeal to the Faculty Evaluation Committee regarding any aspect of the Faculty Evaluation Committee's recommendation or process (CBA 10.240)</p>
12/15	<p>The School Chair forwards his/her reports to the Dean for final disposition at the College.</p>	<p>The department chairperson shall make the record of each evaluation available to the respective faculty members to whom they pertain for his/her review and signature. The record shall include, if available: the Individual Performance Record submitted by the faculty member; the Student Evaluation Committee recommendation; the Faculty Evaluation Committee recommendation; the department chairperson's recommendation, and if submitted, the department chairperson's professional opinion with faculty member's response, and any other exhibits or evidence relied upon or incorporated by reference except course evaluation forms. Each recommendation shall be signed by the faculty member to attest that the faculty member has read it. The chairperson shall then forward a copy of the complete record to the dean by December 15<sup>th</sup>. The School's Chairperson may also inform the faculty member of any errors, so that the IPR is accurate prior to forwarding the documentation to the Dean. Within ten (10) working days of receipt of the School chairperson's recommendation, the faculty member may submit a written appeal to the School's chairperson regarding any aspect of the chairperson's recommendation or process (CBA 10.250)</p>

## **TEACHING**

Teaching is essential to our physical therapy program and our accreditation standards. Teaching provides the vast majority of our annual budget. Providing and supporting high-quality instruction is the responsibility of all faculty, even though not all members are required to spend a large portion of their time in this activity.

All core faculty have an equitable role in distributing duties and time as primary course coordinator/instructors for our required coursework as a part of normal teaching activities. Special recognition does not occur for normal allocation of such duties. Additional instructional effort above and beyond the expectations defined by key documents should be recognized and agreed upon by both the faculty member and the Chair in the faculty member's Annual Faculty Plan form, with oversight from the Dean.

The typical percent effort of FTE for teaching by position in the School are as follows:

- Tenure track: 30-55% (load tends to increase with promotions and experience)
- Clinical Education Non-tenure Track: 30-50%
- Clinical Instructor track: 15-35%
- Program Chair: 15-40% FTE; no less than 15% FTE unless the chair negotiated an additional course release, approved by the Dean.

Student contact time spent in coursework or instruction outside of the School's requirement courses, i.e., elective instruction, can be included in the determination of teaching performance and teaching load as part of the assigned teaching load from the Chair.

## **EVALUATIVE DATA FOR TEACHING ASSESSMENTS**

### Course Evaluation

All required courses and clinical affiliations in our professional program undergo formal student course evaluations using the UMPT student course evaluation form template (**Appendix 2**). It is strongly encouraged that students will be offered class time to complete these evaluations. The primary course instructor, the School's Chair, and the administrative personnel share the responsibility to provide students with course evaluations. Inclusion of guest instructors and adjunct faculty assessment will be left to the discretion of the primary course instructor. It is strongly encouraged that probationary faculty receive course evaluations for all teaching efforts, including guest lecture activities.

We agree to use the following scoring rubric for questions on our course evaluations:

5 = excellent, 4 = very good, 3 = good, 2 = fair, 1 = poor.

Each course evaluation should include objective scoring and an open-ended comments section. Course evaluations may be adapted to fit each instructor's needs with specific questions, but must include the core required questions to facilitate an equitable FEC process (please see **Appendix 2**). Please note that UMPT has opted out of the UM Registrar's student evaluation comments. Required questions on course evaluations are as follows:

1. "This course as a whole was:
2. The course content was:
3. The instructor's contributions to the course were:
4. The instructor's effectiveness in teaching the subject matter was:"

The faculty member should present their course evaluations scores in their Individual Performance Record (IPR) in a manner that eases the burden on their evaluators. Tabular format that includes data for each of the 4 key course evaluation measures within a given course as outlined in the **Appendix 3** is the preferred method. The 4 key course evaluation measures are weighted equally.

#### Student Evaluation Committee Instructional Review

At least three UM DPT students and one faculty observer will be chosen by the Chairperson of the School of Physical Therapy (see CBA 10.230) to serve as the Student Evaluation Committee (SEC). The faculty observer has rights to full participation and access to information of the SEC, except voting. The SEC will select a chair from its voting members. The SEC chair will coordinate meetings of the SEC and the generation of SEC reports. The faculty observer will serve as the liason between the SEC and the FEC. SEC members are not members of FEC and do not attend FEC meetings SEC members shall be in the second or third professional year of the Physical Therapy Professional Program.

The SEC will complete an instructional review form for all faculty members that are to be evaluated for that year. This SEC review form is described in **Appendix 4** and includes a 0-10 (10 is best) ranking of teaching effectiveness in multiple domains. The SEC form may be adapted with the approval of a majority vote of core faculty members. Faculty will provide the SEC with all of their student evaluations for the current review period (at least 1 student evaluation per semester taught for the period of FEC review) prior to the SEC's initiation of the instructional review process. It is the faculty member's responsibility to submit their student evaluations to the SEC in a shared folder prior to the start of the SEC evaluation process The SEC may add additional questions to their form, but these values do not have to be included in the teaching ranking matrix. The absence of SEC participation in the FEC process shall not be regarded as a defect in the evaluation process (CBA 10.235). The evaluation process can proceed in the event the SEC has not exercised its role in the process within the specified deadlines. SEC members will submit their instructional review form to the FEC, via the SEC's faculty observer, on all faculty members that are undergoing review. The SEC's faculty observer will represent the SEC in the FEC meetings.

Faculty members may not exempt themselves from the SEC evaluation process.

We recognize that student course evaluations have some inherent bias and do not fully represent all measures of what is important in teaching effectiveness. Faculty members may choose to undergo a peer teaching evaluation to include in their IPR as a supplement. The format for the peer evaluation is not mandated. The faculty member should provide their peer evaluator with their syllabus, relevant course objectives for the class observation, and associated assessment methods (exam, assignment, etc.) before the evaluation is completed. Preferably, the peer evaluation will include assessment of the value, appropriateness, and rigor of these associated course materials, with structured feedback to support further development.

Additional data may include objective data from graduate exit survey materials, examples of exceptional course materials or assessments, letters of appreciation and recognition of instructional expertise, or teaching recognition or awards. Overall, additional materials should be included to support the FEC's ability to justify a ranking of Normal, Above Normal, and Outstanding when they read an IPR.

## **STANDARDS FOR TEACHING PERFORMANCE RANKING**



### Normal Teaching Duties across Faculty Roles and Instructors:

All courses shall be taught both professionally and ethically in a manner that encourages adult learning and use of current evidence/best practice standards while encouraging both learner and teacher autonomy. We believe all faculty who teach should be “good”, effective, and innovative instructors. All instructors are expected to complete necessary continuing education and training to ensure contemporary instruction, as mandated by our accrediting body.

*Course Syllabi:* Timely dissemination of course syllabi to students at the start of a course is expected. All syllabi should be consistent with our accreditation and University standards. For instance, syllabi should include University-required elements such as course objectives, student accommodation resources, course schedule, and clearly defined assessment and grade criteria. See the UM PT Box folders for a template to use to promote consistency among faculty and ensure that accreditation requirements are met.

*Course Materials:* Course materials should be provided to students through various means, including electronic methods (e.g. Moodle) and may include contemporary means to assist in student learning and knowledge transfer such as lecture outlines, instructor-vetted videos and on-line materials or websites, as well as laboratory manuals.

*Assessment of learning:* Student assessments should provide assessment of student learning, should be preceded with clear expectations, and should be returned to students in a timely manner. Student assessments should be aligned closely with the objectives of each course e.g., assessment of psychomotor skills through an activity such as a “skills check” or “practical examination”.

*Other:* The Curriculum Committee may provide requests for instructors to respond and address areas of concern that arise during annual exit survey interviews completed as part of our accreditation assessment plan. Timely compliance and execution of effective action plans for these requests is also an expected foundational duty of all instructors. Failure to complete any of the foundational teaching duties named in this section are reasonable grounds for a determination of “less-than-normal” Teaching performance for a faculty member.

### **NORMAL:**

*Workload and effort:* Normal faculty teaching performance includes completion of assigned courses necessary for degree completion in our professional program. Expected range of percent effort for each faculty role is outlined in the descriptions given in these unit standards and/or as detailed by our key documents outlined above (e.g. hiring paperwork, faculty planning document).

- *Course Evaluation standard:* Faculty members will achieve an average course evaluation score better than or equal to good (3.0/5.0). A given course evaluation may fall below our good instructional standard that does not necessarily reflect an instructor’s teaching acumen. Therefore, faculty may have a single course evaluation that drops below 3.0 in every other year in their review. It is possible that faculty may not achieve a 3.0/5.0 in the first year of teaching a course, but are expected to achieve a “good” ( $\geq 3.0/5.0$ ) standard in their course evaluations by their fifth semester; or,
- *SEC Instructional Review:* All faculty members are expected to score at least a 7.3 out of 10 in the SEC instructional review, averaged across all the items from each class of students for each year. Faculty are allowed to have a single SEC review from one of our student cohorts (e.g. 2<sup>nd</sup> or 3<sup>rd</sup> year student group) that drops below 7.3 every two years in their

review. Faculty with no prior instructional experience are expected to achieve our instructional standard of at least 7.3/10 by the fifth semester.

### **ABOVE NORMAL:**

Teaching performance shall be considered “Above Normal” if one’s teaching contributions go well beyond our normal instructional standard. The Above Normal instructional standard is typically achieved if the faculty member is teaching within normal ranges of instructional effort for their role in the School, but they achieve a level of instructional performance that is well beyond our current instructional norms. Examples of teaching performance that is well beyond normal:

- 1) The majority of course evaluations responses fall in the “very good” and “excellent” range with an average annual course evaluation score better than or equal to 4.25 on all of our key course evaluation measures; or,
- 2) Score an average of at least 8.7 out of 10 averaged across all the items in the SEC document from each class of students; or,
- 3) Evidence of excellence in teaching outcomes in the form of objective data from graduate exit survey materials, peer evaluations that include comments and descriptors that are consistent with performance that exceeds our minimal normal instructional performance, examples of exceptional course materials, or assessments, or teaching recognition or awards.

Faculty may also demonstrate above normal performance via development of several new courses and/or substantive new teaching methods in response to student and curricular needs.

Faculty members should receive extra compensation as part of the workload agreement and should not rely on the potential for an ‘above normal’ or “outstanding” evaluation to be compensated.

### **OUTSTANDING/SPECIAL RECOGNITION:**

We believe that achieving an Outstanding teaching performance is exceptional and represents sustained performance that far exceeds the normal foundational teaching duties and our normal instructional standards. The Outstanding instructional standard is typically achieved by the two options listed below:

Option 1: If the faculty member spends at least two years teaching at an Above Normal performance standard with more than 10% FTE beyond the range outlined expected for their faculty position (e.g. unit standards, and/or annual faculty plan form) while maintaining at least a normal level of performance in other work categories.

Option 2: If the faculty member is teaching within normal ranges of instructional effort for their role in the School, but they achieve a level of instructional performance that far exceeds our Normal instructional norms. Examples of teaching performance that far exceeds normal:

- 1) the vast majority of their course evaluations responses fall in the “very good” and “excellent” range with an average annual course evaluation score better than or equal to 4.50 on all of our key course evaluation measures; or,
- 2) Score an average of at least 9.0 out of 10 on the SEC Evaluations from each class of students; or
- 3) Evidence of excellence in teaching outcomes in the form of objective data from graduate exit survey materials, peer evaluations that include comments and descriptors that are consistent with performance that exceeds above normal

instructional performance, examples of exceptional course materials, or assessments, or teaching recognition or awards.

Faculty may also demonstrate outstanding performance in other ways, such as a national teaching award and/or an extramural grant that provides sustained and novel learning opportunities for student learning and teaching.

### **SCHOLARSHIP/RESEARCH**

Core faculty are expected to engage in scholarly work that is relevant to their area of expertise. This work will be disseminated to the physical therapy and/or other medical professions, will bring recognition to the School and the University, and will enhance teaching effectiveness. Scholarship/Research is defined as generating new knowledge, understandings, or applications of prior findings through systematic processes and methods that contribute significantly to advancing the physical therapy profession. Research is creative work that requires general public dissemination with peer-review. These works need adequate detail to be able to replicated or elaborated on with future scientific inquiry.

Our accrediting body requires that all core faculty must have a scholarly agenda to disseminate original contributions of scholarly works in a manner consistent with their faculty role. Faculty may pursue a scholarly path as it aligns with the mission of School and edicts of our accrediting body. Faculty members may negotiate specific performance expectations with the Dean and the Program Chair, and these should be made clear to the FEC in the IPR within their annual faculty planning documents, hiring paperwork, or their job contract.

The typical percent effort of FTE for scholarship by position in the School are as follows:

- Tenure track: 40-70%
- Clinical Education Non-tenure Track: 10-20%
- Clinical Instructor track: 5%
- Program Chair: 25-50%

Some activities are normal prerequisites for completing research and do not require inclusion in an IPR: Faculty should maintain compliance with institutional research policies and continued compliance with mandated trainings by federal agencies (e.g. obtaining IRB approval and human subjects protection training, etc.). Pilot data collection procedures, ensuring data fidelity, clean/maintain laboratory equipment, develop future collaborations, and grant management (e.g., budget and progress reports to funding body) are also considered routine duties, and fulfillment of these tasks is a prerequisite for a normal ranking in the performance criteria. However, probationary faculty are encouraged to include the status of establishment of their lab and successful IRB approval in their IPR to demonstrate progress in establishing their research program at UM.

### **EVALUATIVE DATA FOR SCHOLARSHIP/RESEARCH ASSESSMENTS**

Productivity in scholarship for our unit standards is primarily quantified via 1) publication in peer-reviewed, indexed (i.e. Pubmed, SCOPUS) journals; 2) grant activity; 3) national or international scientific presentations; and/or, 4) additional scholarly works. Please see conclusion of this section for UMPT operational definitions of these terms.

#### **NORMAL:**

Normal scholarship is characterized by developing and conducting activities related to a scholarly agenda. Consistent with Commission on Accreditation in Physical Therapy Education (CAPTE

scholarship requirements, all core faculty members are expected to achieve one peer-reviewed unit of scholarship, per two years, at a minimum. A unit of scholarship is defined as a peer-reviewed abstract; a symposium at a regional, national or international meeting; a peer-reviewed publication; or a grant submission. Generally, over a two-year period:

- a) Non-research intensive faculty (<0.34 research FTE) should generally aim to average one (1) unit of scholarly output, per year, per 0.1 FTE dedicated to research;
- b) Since research intensive faculty ( $\geq 0.35$  research FTE) are expected to have greater scholarly impact per produced scholarship item, usual research productivity of research intensive faculty is less than one (1) unit of scholarly output per 0.1 FTE, such as 0.6 units per 0.1 FTE, to emphasize quality of scholarly products over quantity. The scholarship of research-intensive faculty ( $\geq 0.35$  research FTE) should typically include
  1. Yearly average one (1) primary-, senior-, or second- authored peer reviewed indexed publication; or,
  2. one (1) internal or external funding proposal submission every two years, in order to meet criteria for “Normal”.

Probationary faculty have reduced productivity expectations (generally half) during their first years, as agreed upon with the Chair, as emphasis is placed on establishment of their research capability at UM e.g., laboratory establishment, IRB approval.

Regardless if the faculty member is non-research intensive or research intensive, the magnitude of the produced scholarship should be weighted appropriately (e.g., submission of significant grant proposal, such as NIH R01 submission) and overall expectations should be down-adjusted accordingly.

#### **ABOVE NORMAL:**

Above normal scholarship is characterized by the completion of activities more frequently or of a greater impact than typical, viewed in the context of the School, role, and the field of the faculty member, while greatly exceeding the criteria for “Normal”. Significant and impactful peer-reviewed national/international presentations or publications i.e., high impact and physical therapy-relevant journals that are indexed in Pubmed and/or Web of Science; presentations at national or international conferences, or, significant extramural funded grant activities will typically be required for “above normal.” Faculty should typically have major (primary, senior, or second-authored) roles in publications and presentations, but primary investigator status is not required for funded grant awards. Patents or other major products that fit the criteria described at the end of this section (see, “Additional scholarly products” are also acceptable.

#### **OUTSTANDING/SPECIAL RECOGNITION:**

Outstanding scholarship will be considered when activities reflect a high level of activity that far exceeds Above Normal performance, such as a greater than expected number of significant and impactful peer-reviewed publications and/or presentations with major authorship roles (primary, senior, or second-authored) or the attainment of a substantial grant that greatly enhances the value and reputation of the School and the University. Substantial grants include foundation (e.g., Academy of Orthopaedic Physical Therapy) or agency-level (e.g., National Institutes of Health) grants. Scholarship will be viewed in the context of the School, role, and the field of the faculty member. National or international awards for significant and impactful research in the physical therapy profession can also characterize outstanding scholarship. Any single scholarly

achievement should be robustly supported by other scholarly works i.e., a single peer-reviewed publication, research award, or funded grant is not typically sufficient to achieve Outstanding.

#### Peer-reviewed Publication and Manuscript Record

Scholarly efforts amongst accredited physical therapy programs are measured in large part by peer-reviewed publications that are indexed in the national clearinghouse for scientific publications i.e., PubMed. PubMed indexed journals are operationally defined as journal contents that are searchable using subject headings (keywords, author's names, title, abstract, etc.) in PubMed. Only those manuscripts published during the review period should be counted towards performance criteria. Manuscripts listed as “in press” should only be included in the IPR if the author has received notification of acceptance from the journal editorial group and faculty are encouraged to include documentation of acceptance. Also, publications that are currently in review should not be included in the IPR as anything other than “works in progress” and do not count as published works. Works in progress are only listed on an IPR for one year without explanation for the delay in publication.

#### National Presentations and Public Dissemination Record

Abstracts and subsequent national and international presentations that undergo formal peer-review (e.g. APTA national meetings) are the standard for this category of scholarship. More prestigious and named keynote presentation opportunities are more highly valued types of dissemination. Research dissemination may include non-peer-reviewed activities such as a national press release, an infographic related to new research findings, or participating in other media such as podcasts. These activities are important for building national reputation and the physical therapy profession in general, but given their non-peer-reviewed nature, are not as highly valued in the performance rankings. Only works presented in the review period are needed in the IPR; listing of accepted research presentations e.g., conference abstracts, or future invited speaking engagements is permitted, but will not be considered in determination of performance.

#### Impact, Engagement, and Utilization of Scholarly works

Faculty members are encouraged to use external independent sources, published studies on academic performance, and quantifiable public standards (e.g. citation reports, Impact Factors, CAPTE reports, h-index) to provide evidence of the magnitude and potential impact of their accomplishments. Recognition of research-specific performance and influence outside of the University is especially meaningful in our ranking descriptions. Likewise, evidence to support the clinical translation/implement of research findings are desirable outcomes. External recognition and acknowledgements of scholarly acumen, such as awards, are valuable signs of high scholarly performance.

#### Research Funding (Grants, Awards, Licensing Agreements for Intellectual Property, Contracts)

Tenure-track lines have a larger dedication of effort towards scholarship with an understanding that part of this dedicated effort should be spent in generating extramural funding. Awards that involve larger budgets, support personnel salaries and benefits, and include full negotiated Facilities & Administration rates (F&A; also called indirect costs or IDCs), are valued highly in the assessment of performance. Internal grants and foundation awards are generally smaller and limit F&A recovery, but build a record of grant management to improve success in submitting for larger awards. Grants in which the faculty member serves as principal investigator (PI or Co-PI) are highly valued; however, leadership as a PI is not necessary for Outstanding/Special Recognition. Grant submissions are important part of the scholarly record and faculty members should include identifying information (title, investigators, sponsors, funding requested, dates) in

their IPR. Salient points from their grant review process (e.g. grant rating or percentile scores) may be included, but are not necessary. Patents, contracts, and awards are also viable means of showing scholarly skill and supporting research efforts.

#### Additional Scholarly Products

Additional scholarly works could include items such as white papers, non-peer-reviewed papers, monographs, published abstracts, booklets, book reviews, policy publication, non-peer reviewed scientific editorials or opinion piece, obtaining research equipment grants, obtaining a traveling scholarship or visiting fellowship, book chapters, and local-state-regional research presentations. Conducting continuing education courses are considered supplemental evidence of teaching performance and should not be considered part of Scholarship. Although, manuscript or grant review can have a powerful impact on research capability and opportunities, UMPT considers these service activities.

### **SERVICE/ CLINICAL OR PRECEPTOR WORK / ADMINISTRATION**

Effective service work is necessary to maintain accreditation and support our programmatic objectives. Many faculty members make important service contributions to university relations or to the community that are not directly related to their appointments; however, these efforts are considered in promotion and tenure decisions only to the extent that they contribute to the mission of the School, College, or University.

Service contributions can be satisfied by participation in School, College and University committees and task forces, initiatives, or working groups. Service may also include participation and active engagement in professional organizations and committees at regional, state, national, and international levels. Level, depth, and breadth of service is expected to grow with rank and align with School, College, and University mission and goals. Moreover, service performance should be evaluated in light of each faculty member's position, FTE, and assigned workload as follows:

- Tenure track: 10-15% Service (load tends to increase some with promotions)
- Clinical Education Non-tenure track: 5-15% Service plus 25-40% Clinical Ed Admin
- Clinical Instructor track: 5-10% service or admin, 70-80% Clinic
- Program Chair: 10-15% Service plus 25-35% admin

*Advising*: Each faculty member should maintain an equitable amount of advising, mentoring, and serving as a role model for the DPT students. This includes meeting with students who may need some additional assistance in order to achieve entry-level competency in the course material.

We expect each core faculty member will be an active participant in our Professionalism and Academic Review Committee (PARC) and follow associated duties with this committee as outlined in our faculty handbook

### **EVALUATIVE DATA FOR SERVICE ASSESSMENTS**

We recognize that it is difficult to uniformly determine when service activities raise performance to a level that exceeds normal. To assist assessment of service performance, we provide the following guidance.

**NORMAL:**

As set forth in section 6.200 of the CBA, all faculty are expected to professionally participate in the work of the unit and of the institution. All core faculty who are voting members of the School should regularly attend and provide informed participation in faculty meetings, and complete all assigned committee and working group assignments and duties per their role in the unit. Core faculty also are key members of our Professionalism and Academic Review Committee (PARC) and should participate accordingly. Further, there should be some engagement and regular participation in curriculum issues including some roles in strategic planning and program refinement. Student advising is necessary to accomplish our educational goals and we expect all core faculty members, other than the chair and CPTIs, to have some assigned student advisees with regularly meeting opportunities for these students. Last, all faculty members must provide some level of peer-review through activities such as faculty evaluation committee (FEC), chart reviews, or peer teaching assessments.

Tenure-track/research faculty members may have additional service duties related to research. It is expected that tenure-track faculty and those who publish peer-reviewed manuscripts will regularly provide some peer review service (e.g. manuscript or abstract reviews). Occasional presentations/updates to the public such as presentations to local student or public service groups represents normal service activity.

The required participation in these normal foundational service duties will represent at least a 5% FTE from all faculty members. No tenure-track faculty member should be given a service load that is below 10% effort. In addition, all faculty are expected to increase their service roles in response to accreditation visits and renewal documents. Faculty members should anticipate lowered potential to complete other service opportunities when the program is preparing for an accreditation visit.

**ABOVE NORMAL OUTSTANDING OR SPECIAL RECOGNITION**

Important and significant impacts would be demonstrated by improved outcomes data (e.g., streamlined processes, increased recruitment, greater student satisfaction, etc.) considered to have meaningful impacts that are aligned with the School, College, and University mission. Faculty are expected to share details of the quality of the service provided and/or success in accomplishing their objectives. Details could include the number of students served, evidence of innovation or creativity, emails or letters of appreciation for work completed, or more formal assessments by those who received services.

Further, we recognize that service work exceeds normal when a faculty member spends significant effort in an assigned duty that requires participation that exceeds the effort outlined in annual planning documentation. Completing service work or roles that are not agreed by the Chair or the Dean may not merit performance ranking that exceeds normal.

Service that exceeds normal performance could occur due to extraordinary leadership performance. Extraordinary leadership could be evidenced by novel and independent initiative to guide, organize, and coordinate the work needed to substantially advance the enterprise of the School, College, or Profession.

Above Normal service is operationally defined as service that has a lasting effect on the reputation and operation of the School. Examples may include orchestrating structural curricular changes affecting the educational delivery of the School or securing and administering funding to expand

the School's community outreach. Some unique service activities merit ranking beyond normal given their rare and/or influential impact. Such activities help build the reputation of the School and thus can provide new opportunities for others (e.g. improved student & faculty recruitment).

Outstanding service is operationally defined as service that has a lasting effect on the reputation and operation of the School and a marked impact at the national level. Some examples of these unique service activities consistent with an of Outstanding performance include:

- Editor of the *Physical Therapy Journal*
- National service award from a professional group
- Sitting on agency-level (e.g. NIH) review panel
- Election to a governing board of a national organization
- Grants and awards providing funding for substantial service activities

Faculty members should disclose if their service activity is paid/receives a stipend, such as compensated School, College, or University service, work as an expert witness, or teaching continuing education if they are reporting this work as "Service". Mentorship between faculty members and across units can be valuable service and we encourage faculty to document and include this activity in IPR submission when completed. Documentation for training grants or printed emails suffices for evidence of mentoring.

*Faculty members with directorship roles have larger-than-average assigned service/clinical/administrative loads that reflect specific positions (e.g., School Chair, Directors of Clinical Education). As such, normal increment evaluation standards will reflect the additional expectations of effective clinical, leadership, and/or administrative duties as established in the CBA (section 16.20 Chair data) or according to assigned workloads as detailed in the annual faculty planning document.*

## **PROMOTIONS**

Tenure-track and nontenurable faculty members of the CBA are eligible for promotion. Minimum qualifications for recommendation for promotion must include the satisfactory achievement of the normal standards in all academic categories associated with the individual's faculty role. The faculty member must possess a terminal degree for promotion. Our terminal degree must include either: A) a post-entry level professional degree that grants access to licensure and professional practice (preferably a Doctorate of Physical Therapy), or B) an academic doctorate degree (e.g. PhD, ScD, EdD). Also, all faculty members must establish credentials as a scholar consistent with their faculty role, which means every faculty member must be able to demonstrate the capacity to engage in one or more types of scholarly activity and disseminate the results to a variety of stakeholders. In addition, faculty must maintain contemporary expertise in assigned teaching areas beyond what they have obtained in an entry-level physical therapy program. Please note that completion of the required number of years in rank is not in itself adequate grounds for promotion. The requirements outlined in the CBA must be met in regards to each of the respective types of advancement. Specific additional criteria for promotion within our School includes:

### **To Assistant Professor:**

- Possession of a terminal degree and minimal faculty qualifications as defined above.
- Service activity at the School/College level

### **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 when they start their fourth year in rank)
- Possession of a terminal degree and minimal faculty qualifications as defined above.
- It is understood that both the quantity and quality of documentation to achieve Associate Professor will be higher than that required for Assistant Professor.
- Clear demonstration of continued professional growth and increasing value to the School, College, and the University.
- Service activity that is positively recognized through documentation and includes service at the School, College and University level, as feasible and/or relevant regional, state, national, or international agencies.
- Evidence of professional recognition at the regional, state, national, or international level.
- Tenure-track faculty have a large percentage of their effort dedicated to scholarship/research and typically received start-up funding to develop their research agenda. It is expected that tenure-track faculty make attempts to obtain extramural research funding in order to be eligible for promotion. The source of the extramural funds is not a meaningful determinant factor for criteria for promotion. To achieve promotion/tenure, an applicant needs to demonstrate capability of obtaining extramural funds to support research. Further, tenure-track faculty must include a record in peer-reviewed publications during their review period. One example would be primary or senior authorship in peer-reviewed indexed journals from data collected or work completed while at the University of Montana. No faculty member may be promoted to the rank of Associate Professor on the basis of teaching and service alone (CBA 10.110). Scholarship shall be demonstrated by continued scholarly publication.

**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 start of their fifth year of employment of rank as Associate)
- Possession of a terminal degree and minimal faculty qualifications as defined above.
- It is understood that both the quantity and quality of documentation to achieve Professor will be higher than that required for Associate Professor.
- Clear demonstration of continued professional growth and increasing value to the University beyond the improvements demonstrated to become an Associate Professor.
- Service activity that is positively recognized through documentation and includes service at the School, College and University level, as well as at the state, regional, national or international level.
- No faculty member may be promoted to the rank of Professor on the basis of teaching and service alone (CBA 10.110). Scholarship shall be demonstrated by continued scholarly publication.

**TENURE**

The criteria for tenure shall be no less than those established for promotion to Associate Professor for tenure-track faculty. A probationary tenure-track faculty member shall be eligible to make an application for tenure after the appointee has completed five (5) years of credited service toward tenure, that is: during the year when they start their sixth (6) year of credited employment (CBA 9.310). To be considered for tenure the faculty member must possess the appropriate terminal degree,

meet our minimal faculty standards, and demonstrate continuing professional growth. Recommendation for tenure must be in accordance with the CBA in effect at the time of application. This requires clear evidence that the applicant has achieved or is in the process of achieving recognition in his/her field of competence beyond the University of Montana. An award of tenure is based on meeting the School's standards for teaching, scholarly activity and research in the context of the faculty member's appointment. A recommendation for tenure represents a judgment by the School that a faculty member has made significant contributions to the strength of the University of Montana's School of Physical Therapy education and will continue to do so moving forward.

### **EXTERNAL LETTERS OF REVIEW**

External letters of faculty review are required during the promotion process: a) either when a faculty member requests promotion to Associate Professor or when they are requesting tenure, and b) when a faculty member applies for promotion to Professor.

The faculty member is responsible for initiating the external review. By April 15<sup>th</sup> of the academic year prior to seeking promotion, the applicant will supply the FEC Chair with a list of 4-6 names and contact information of people who are well-suited and capable of appraising the applicant's work history and career performance. In addition, the applicant must provide their curriculum vitae; a summary of achievement letter that includes an overview of their performance in scholarship, teaching, and service; and a description of role assignment/allocation of FTE for the review period. The external reviewers chosen by the applicant should be free of conflicts of interest with the applicant, operationally defined as a collaborator, professional organization committee co-member, or working relationship (all within past 2 years) or in a personal relationship with the applicant. The applicant will disclose how they know the external reviewers listed during their external review request and will include this information in their IPR. These external reviewers need to be of equivalent or higher rank than the rank that is being requested by the applicant. For instance, external reviewers who are Assistant Professors cannot review applications for Professor rank. Further, it is preferred that the reviewers work in a similar faculty role as the applicant. The FEC Chair will send an invitation letter by the September 1st to the selected external reviewers. The letter will ask the reviewers to evaluate the applicant's performance in accordance with our Unit Standards. The letter will include attachments of the appropriate version of the School's unit standards as well as the review materials supplied by the applicant. Letter writers will be notified that their identity will only be known to the FEC committee and will not be shared with the faculty applicant. Letters will need to be returned to the FEC Chair by Oct 10<sup>th</sup> in order to facilitate review by the FEC. At least two reviewers need to be willing to write letters or the FEC Chair and faculty member will need to expand the number of requests. In the event that it is not possible to secure two external reviewers, the FEC will consider the application for promotion to be incomplete (CBA 10.110 and 10.240). Therefore, applicants are strongly encouraged to only put forth names of suggested external reviewers who have a high likelihood of accepting the invitation. The applicant will be informed by the FEC Chair that letters are completed, but the letters will be placed in the record blinded and without the applicant's review. If the applicant requests to see the contents of the letters, then all identifiable material in the review letter will be redacted by the FEC chair prior to sharing a copy of the letter contents with the applicant. These letters will be considered in the justification of the decisions made by the FEC. The FEC may choose to disregard the contents of any external letter if they deem the reviewer has shown a bias towards or against the applicant relative to a prior working or personal relationship with the applicant beyond professional circumstances. If the FEC believe there has been an unfair bias in the

letter(s), then they need to explain their rationale and describe how it impacted their decision-making in the language of their FEC recommendation letter.

## **SALARY INCREMENTS**

### *Normal Increment:*

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 and will be rewarded with a "normal" increment to their salary. Annual scholarly activity, completion of all assigned teaching workload, and an equitable service component as outlined in the faculty member’s hiring contract or annual planning process are expected.

### *Merit (Tenure track) or Outstanding Performance Awards (Non-tenurable faculty):*

To be eligible for a merit award or OPA, a faculty member must have demonstrated either: Above Normal performance in at least two (2) of the three (3) areas: teaching, scholarship/research, or service/administration/clinical; OR 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. Performance is to be evaluated consistent with workload assignment.

### *Less-than-normal Increment:*

Evaluative criteria for less-than-normal recommendations in each academic category of teaching, scholarship/research, and service/administration/clinical are outlined above. Achieving a less-than-normal ranking of performance in two or more academic categories requires the FEC to give a recommendation of less-than-normal salary increment. If a faculty member is given a less-than-normal ranking within a single category, then the FEC will determine if this performance will rate as a “normal” or “less-than-normal” salary increment.

Absence of performance in a category due to the limited scope of assigned duties and employment (e.g. research faculty = 100% scholarship/research) does not constitute grounds to offer a less-than-normal ranking in those categories where no effort is assigned. Failure by a faculty member to submit an IPR for evaluation when required (see CBA 10.210, 10.220) is grounds for a less-than-normal increment.

### *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.

## **RETENTION**

### *Probationary Appointments:*

A probationary appointee has the right to serve the specified term of the appointment and may be discharged only in accordance with CBA procedures.

### *Non-Tenure Appointments:*

The performance of Faculty members holding a non-tenured faculty appointment of 0.5 FTE and above is evaluated annually by the FEC. The evaluation is based on documentation prepared by

the faculty member in light of their assigned duties in teaching, scholarly activity, and service. All such appointments shall be in keeping with existing University of Montana Policy.

The work of Lecturers, Adjuncts, Clinical, and Research Faculty can be requested to be evaluated by the School (FEC) and independently by the School's Chair during any year.

The work of Visiting Faculty and International Visiting Scholars shall be evaluated by the FEC, if they continue with the School of Physical Therapy and Rehabilitation Science beyond one academic year.

### **REVISION OF STANDARDS AND PROCEDURES**

These standards and procedures are subject to periodic review by the Unit Standards Committee and may be revised according to the procedures outlined in section 10.130 of the CBA.

## Appendix 1

# Faculty Plan for the Academic Year 20\_\_-20\_\_

Name: \_\_\_\_\_ Date submitted AY: \_\_\_\_\_ Date reviewed AY: \_\_\_\_\_

**For each section, outline work planned with dates and/or resources requested for planning. Please DELETE sections that do not apply before submitting to your Chair or supervisor.**

### **TEACHING: ??% effort ( ?? teaching hrs/ 450 hrs)**

#### Instruction in DPT curriculum

Course # & brief title	Year students, Term & Block	Credits	Contact hrs	Primary instructor (Y/N) & % of course contact hours taught ; other role
PT ??? - ?????	DPT?, Autumn, B?			
...add more rows as needed...				
		TOTAL	hrs	??/450hrs = ??%

- Electives, Trends classes, or teaching outside of DPT curriculum:
- Teaching in Integrated Clinical Experiences (ICE) Time, #students, etc.:
- Clinical Education Courses and Related activities:
- Other Instructional activities:
- Undergraduate research mentorship:

#### PLANS FOR DEVELOPMENT:

- Areas for Improvement or Changes: (example: mentoring in writing course objectives, curriculum development, student assessment, and online / blended instruction, addressing exit interview, course evals peer review) Include strategies for success and dates if possible for planning purposes.
- Resource needs: (TA needs, amount and cost of supplies, equipment, space.)
- Plans for how will you ensure currency for your instructional content?

### **SCHOLARSHIP: ?? % effort:**

**List specific activities w/ measurable targets, dates, or goals as fitting**

#### RESEARCH ACTIVITIES

- (software development, equipment install/upgrade, data collection/analysis activities, IRB, etc)

#### MANUSCRIPTS AND PAPERS

- In review (authors, title, journal):
- To be submitted for AY (dates and target journals planned if possible)

#### GRANT/AWARD ACTIVITY

- Current: (if possible include sponsor, size, anticipated % FTE, role, funding dates):
- Submitted/Planned grants (also describe needs for space, proposed dates, space use, teaching buyout, other personnel effort requests from UMPT, etc):

#### PRESENTATIONS OR ABSTRACTS

- (authors, meeting, dates, title if possible):

*OTHER*

- (plans for visiting scholars, software creation, patents and intellectual property, etc)

**PLANS FOR DEVELOPMENT:**

Areas for improvement or Change (include strategies for success)

Resource needs/wants:

**SERVICE/ADMINISTRATION/CLINICAL: ?? % effort:**

Examples include committee assignments, service work, leadership activities, advising

- *School:*
- *College:*
- *University:*
- *Professional:*
- *Community:*
- *Nationally/Internationally:*
- *Mentorship Activities:*

If needed, please add explanation for how service aligns with School and personal mission.

**PLANS FOR DEVELOPMENT:**

- Areas for improvement or Change (include strategies for success)
- Resource needs/wants:

**OTHER EFFORTS: ? % effort**

**List specific ACTIVITIES**

Examples might include program development, special assignments etc.

**1-Year Goals:**

**5-Year Plan (big picture):**

**Chair Review and Recommendation: (completed by Chair)**

Brief summary or rationale for planning/development or to explain work load distribution and accomplished during AY to build understanding of the faculty member’s role and program contribution.

\_\_\_\_\_  
Faculty member signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Chair Signature

\_\_\_\_\_  
Date

## Appendix 2: Student Course Evaluation Template

### *Student Comments*

#### **Q1 - This course as a whole was:**

#	Answer	%	Count
5	Excellent	0.00%	0
4	Very Good	0.00%	0
3	Good	0.00%	0
2	Fair	0.00%	0
1	Poor	0.00%	0
	Total		0

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	This course as a whole was:	0.00	0.00	0.00	0.00	0.00	0

#### **Q2 - The course content was:**

#	Answer	%	Count
5	Excellent	0.00%	0
4	Very Good	0.00%	0
3	Good	0.00%	0
2	Fair	0.00%	0
1	Poor	0.00%	0
	Total		0

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	The course content was:	0.00	0.00	0.00	0.00	0.00	0

**Q3 - The instructor's contributions to the course were:**

#	Answer	%	Count
5	Excellent	0.00%	0
4	Very Good	0.00%	0
3	Good	0.00%	0
2	Fair	0.00%	0
1	Poor	0.00%	0
	Total		0

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	The instructor's contributions to the course were:	0.00	0.00	0.00	0.00	0.00	0

**Q4 - The instructor's effectiveness in teaching the subject matter was:**

#	Answer	%	Count
5	Excellent	0.00%	0
4	Very Good	0.00%	0
3	Good	0.00%	0
2	Fair	0.00%	0
1	Poor	0.00%	0
	Total		0

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	The instructor's effectiveness in teaching the subject matter was:	0.00	0.00	0.00	0.00	0.00	0

**Q5 - Additional comments:**



### **Appendix 3: Format for Individual Performance Reviews (IPR)**

**\*\*ALWAYS LIST USING REVERSE CHRONOLOGICAL ORDER\*\***

**\*\*IF YOU HAVE NO ITEMS FOR A CATEGORY THEN PLEASE OMIT IT\*\***

1. Number pages in consecutive order.
2. Page 1 titled “Individual Performance Record”
  - a. Include the following data
    - i. Name and Degree:
    - ii. Present Academic Rank:
    - iii. Academic Unit: College and School
    - iv. Date Hired:
    - v. Date Last Promoted: (Date the promotion was effective)
    - vi. Merits: (List all by the date they were actually received)
    - vii. Documentation Period included in the current IPR: start and end date
3. Page 2 is your Cover Letter
  - a. State if you are requesting consideration for a Normal Salary Increment, Merit, Promotion, and/or Tenure and provide a rationale for the action
  - b. Share some goals and plans for the future within the context of your appointment
  - c. Focus your IPR on objective & measurable outcomes with concise summary information
4. If desired and appropriate, utilize a Table of Contents as page 3
5. Faculty Evaluation Record: Your Prior Requests w/ matching Reviews & Determination Letters
  - a. Precede each academic year’s record with a title page described as “Faculty Evaluation Record” that includes:
    - i. Action request by faculty member each year: e.g. Normal, Merit, Promotion
    - ii. Provide the SEC, FEC, Chair, Dean, and Provost Evaluations for each review done
6. Other Pertinent Documentation if needed or appropriate
  - i. Examples: Market Adjustment Requests, Tenure Extensions, Sabbatical and/or Leave of Absence Documentation
7. Teaching
  - a. Please provide a TABLE that should generally match your faculty planning document that lists courses taught in the Professional Physical Therapy Program starting with the most recent academic year in the rows & include columns for:
    - i. Course Number & Title
    - ii. Semester &/or block number
    - iii. Number of credits
    - iv. Number of contact hours
    - v. Role in course (e.g. primary), % course taught, number of students enrolled
  - b. Add another Table if you teach courses outside the UM Physical Therapy Program
  - c. Clinical Instructor, Internship Mentor, Undergraduate Research Mentor, etc.
    - i. Course number, title, and number of credits as appropriate
      1. Semester and year
      2. Number of students enrolled taught
  - d. Graduate Student Thesis Committee Membership
    - i. Student name, Degree sought, Program

- ii. Current status (proposal date, defense date, or completed/withdrawn for the program)
- iii. Describe your role on the committee (e.g. chair, committee member)
- e. Advising Students in the Physical Therapy Professional Program
  - i. List advising activities or unique duties with advisement, number of students by year
- f. Course Evaluations scores in table format of with course titles as rows, and year in a manner that follows your course listing above in 7a followed by 7b. Evaluations for all courses taught as part of your assigned workload need to be included in the IPR record  
EXAMPLE TABLE:

Course # & brief title	Year students, Term & Block	Credits	Contact hrs	Primary instructor (Y/N) & % of course contact hours taught ; other role
PT 529 Clin Biomech	DPT1, Autumn, B1	5	90	Yes primary, 100% course taught
PT 527 Phys & Elect agents	DPT1, Spring, B4	3	35	Yes primary, 55% of course taught
PT 569 MSM II	DPT2, Autumn, B6	6	26	No, roughly 28% of course taught
PT 676 Clinical Reasoning	DPT3, Autumn, B9	1	16	No, teach most of course for 4 students
TOTAL			177 hrs	177/450hrs = 39%

- i. The course eval comments and narrative for all courses taught needs to be listed. Each academic year's record should be preceded by a title page or clear means of division
- g. Course Syllabi and Course Objectives – These materials may be included as an appendix as the faculty member desires. As the syllabi are collected on our shared UM BOX repository, the inclusion of syllabi and course objectives are not a required element.
- h. Other
- 8. Research/Scholarly Activity
  - a. Peer-reviewed Publications in Referred Journals
    - i. Clearly differentiate between published or “in press” works
    - ii. Clearly identify publications that are or are not indexed (e.g. PubMed, Scopus)
    - iii. Faculty may add if the publication was an invited or award-winning paper in this section as well as below in the awards section
    - iv. List author order, title, journal name, year published, volume (number), pages.
    - v. Adding items such as the manuscript's PubMed ID or the current impact factor of journal where the article was published are encouraged
  - b. Grants: (List most recent first) title, investigators & their role (e.g. PI), sponsors, funding requested, dates, key aims and add relevant grant review info such as grant rating and/or percentile scores
    - i. Include sub-categories for Grants Awarded, Pending, Approved but not Funded, and Submitted and undergoing funding consideration as needed
  - c. Presentations and abstracts at Conferences, Annual Meetings, and Symposia
    - i. Identify the size or scope of the conference (national, regional, state, etc)
    - ii. Clearly differentiate between those that have been peer evaluated versus those that have been solicited
    - iii. List or identify published abstracts associated with the presentations as you deem appropriate
  - d. Citations of One's Works: Identify the source and date of retrieval of data. You are encouraged to use metrics such as H-index and identify national standards in your IPR

- e. Awards and Honors
- f. Books and Book Chapters
  - i. Clearly differentiate as published, in press, or have been submitted
  - ii. Provide title, scope of the work (eg. page number, chapters, citations used, etc)
  - iii. If readership or dissemination information is available then please include
- g. Other: Any additional scholarly materials such as non-peer reviewed publications,
- 9. General Service (always provide dates of service)
  - \* For committee work: list the committee name, faculty role, and year(s) of membership
  - \* Provide details so evaluators can appreciate the scope and impact of work (eg. number of students involved, leadership provided, evidence of innovation, outcomes data, programmatic objectives met)
  - \* Identify those service activities that are paid but the amount of payment received is not necessary
  - a. University Committees and Service
  - b. College of Health Committees and Service
  - c. School of Physical Therapy and Rehabilitation Science Committees and Service
  - d. Professional Service
  - e. Manuscript Review & Editorial Service (list journal and number of manuscripts reviewed or provide the scope of editorial duties required)
  - f. Continuing education programs, workshops taught, or instructional content for external entities other than the University of Montana
    - i. Provide the title, location, hours of instruction, sponsor, number of attendees
    - ii. Identify if remuneration for teaching was provided but the amounts and particulars of the financial agreement is not required
  - g. Advising pre-Professional Physical Therapy Students
    - i. List activities and number of students assigned and assisted.
  - h. Service to Student Groups and Organizations
  - i. Professional Memberships
  - j. Continuing education programs and workshops attended for work related job duties or for accreditation purposes
  - k. Other service activities such as clinical consultation, expert witness, professional consultation
- 10. Special Assigned Clinical & Administrative Work
  - a. School's Chair, Clinical Education faculty, and/or Clinical Physical Therapy Instructors
- 11. Professional C.V. as desired by the faculty member unless it is required by the Provost or CBA
- 12. Other Documentation as determined necessary by the faculty member such as syllabi, copies of manuscripts, grant submissions, abstracts/posters, and course evaluations

## APPENDIX 4 - Student Evaluation Committee Form Template

Faculty Evaluation of Class of 20--- 2<sup>nd</sup> Year Students – October 20--

**Review of Dr. \_\_\_\_\_**

**Explicit and Implicit Curriculum**

**\*\*Strengths:**

**\*\*Areas for Improvement:**

**Explicit Curriculum Focused Questions:**

Please rate \_\_\_\_\_ on a scale from 1-10 (1 being “strongly disagree”; 10 being “strongly agree”)

Field	Min	Max	Mean	Std Deviation	Variance	Count
Instructor is effective in teaching their core subject(s).						___/36
Instructor plans class time and assignments that help students to problem solve and think critically.						___/36
Instructor provides constructive and respectful feedback in response to students’ questions and concerns.						___/36
Instructor presents course information and expectations clearly and coherently.						___/36
Instructor demonstrates command and knowledge in the subject area of their teaching.						___/36
Instructor presents subject matter in a way that is critically relevant to the physical therapy profession.						___/36

**Implicit Curriculum Focused Questions:**

Please rate Dr. ??... on a scale from 1-10 (1 being “strongly disagree”; 10 being “strongly agree”)

Field	Min	Max	Mean	Std Deviation	Variance	Count
Instructor follows through on what they say. You can count on the instructor’s word.						___/36
Instructor demonstrates availability and responds to emails and phone calls in a timely manner.						___/36
How well does the instructor model core values through how they behave with students and with other members of the faculty?						___/33

**Please provide additional comments or feedback for Dr. ?**