

11 September 2026

FACULTY EVALUATION

FEC Chair Training

2026–2027 Cycle | Faculty Evaluation Committee Chairs

Presented by the Office of the Provost & the Office of Conflict, Resolution, and Policy

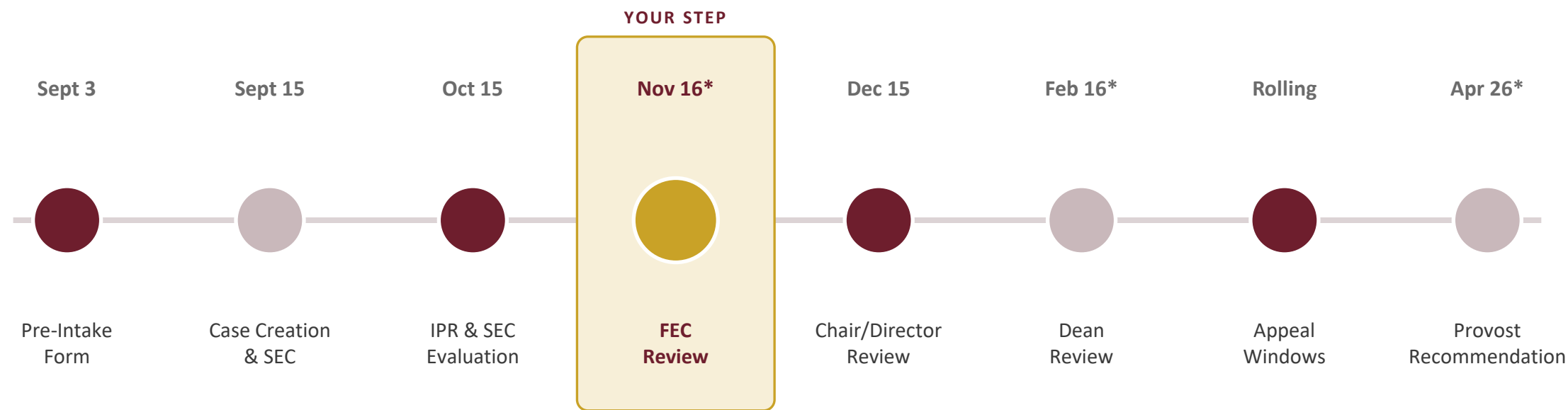
Josh Flores Groomer, AVP — Office of the Provost | Alicia Arant, AVP — Conflict, Resolution & Policy

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Where FEC Fits in the Cycle

Your committee's window opens when Department Chair/Director early access begins, and closes when your recommendation is due.



** Nov 15, Feb 15, and Apr 25 shift to the next business day when they fall on a weekend/holiday.*

FEC Composition & Purpose

Elected annually

The FEC is elected each year by the unit; members elect their own chair.

At least 3 tenured/tenure-track + 1 student

A minimum of three (3) tenured or tenure-track faculty, plus one non-voting student observer appointed by the FEC Chair.

Chairs are not members

Department chairs cannot serve on the FEC (CBA 10.240). If one is on the roster, they need to be removed.

Short-staffed? Look outside the unit

If your unit doesn't have enough eligible members, you may include faculty from related fields with the Dean's approval.

External reviewers are optional

Units may solicit external peer review to assist with promotion & tenure decisions; unit standards should specify confidentiality and who solicits the letters.

Completing Your Step in Interfolio

Two separate things happen in Interfolio once your FEC has deliberated — and only one of them is yours to do personally.

1 Your written recommendation

You write and sign it (with your FEC); your FE Manager uploads it to the case as a Required Item — you don't need Interfolio access to do this part.

2 The required Interfolio form

Only the person designated as Committee Manager (the star icon) can see and submit this form. If that's you, no one else — including your FE Manager — can complete it for you.

If no one is designated Committee Manager, the form can't be completed and the case can't move forward — confirm with your FE Manager that you're starred.

Completing the Required Form — Step by Step

1

Log in

Use the UM Single Sign-On link, or go to account.interfolio.com/login and sign in with University of Montana as your partner institution.

2

Open the case

From the left navigation, click Cases, then click the candidate's name.

3

Go to Case Details

Select the Case Details tab (not Case Materials).

4

Fill Out Form

In the Required Items section, click Fill Out Form, answer every question, and click Submit Form.

A green checkmark means complete; a red exclamation mark means it still needs your attention.

Your Recommendation Letter

The single most common issue with FEC letters last cycle: missing identifying information. Before you send yours to your FE Manager, confirm it includes:



The department or academic unit's name



Your name as FEC Chair



The date



Your signature

Help your FE Manager by naming the file yourself before you send it. The standard is: **Candidate Last Name _ Review Step _ Document Purpose _ Date**

Recommendation

Parton_FEC_Recommendation_20261115

Recommendation Revision

Parton_FEC_Recommendation
Revision_20261129

Appeal Response

Parton_FEC_Appeal Response_20261203

Same format for every document you send through your FE Manager — recommendations, appeal responses, and revisions alike.

How Your FE Manager Supports You

YOUR FE MANAGER

- Creates the case and assigns you as Committee Manager (the star icon)
- Uploads your written recommendation letter as a Required Item
- Notifies the candidate once your recommendation is shared
- Moves the case forward to the next review step once your form is complete
- Notifies you if the candidate appeals the recommendation
- **DOES NOT** prepare your letter for you
- **DOES NOT** complete the required Interfolio form for you

YOU, AS FEC CHAIR

- Coordinate your committee's deliberation and write the recommendation
- Sign and date the letter, and send it to your FE Manager
- Personally log in and complete the required Interfolio form
- Respond to an appeal within 10 working days, if one is filed

Your Timeline & Deadlines

Oct 15

Your access begins

The FEC review step opens; Department Chair/Director also gains early access to IPR materials on the same date (CBA § 10.220).

Nov 16*

Recommendation due

Your written recommendation and required form are due; the case moves to the Chair/Director step.

10 working days

Your appeal-response window

If a candidate appeals, they email your FE Manager directly — your FE Manager then notifies you by email. From that notification, you must grant or deny the requested remedy within 10 working days.

** Nov 15 shifts to the next business day when it falls on a weekend/holiday.*

UP NEXT

What the CBA Requires, Applying Unit Standards, Reviewing Non-Tenure Track Faculty, & Writing Recommendations

Alicia Arant

Associate Vice President, Office of Conflict, Resolution, and Policy

Recusals & Conflicts of Interest

Recusals

If the FEC includes the candidate being evaluated — or anyone with a conflict of interest — recuse them from that case. FE Managers are trained on how to recuse committee members in Interfolio.

What counts as a conflict of interest (CBA 10.310)

- No one may participate in evaluating themselves, or anyone related to them by blood, marriage, or cohabitation — or with whom they're engaged in adversarial litigation or proceedings.
- No one may participate in evaluating anyone with whom they have a business relationship that could reasonably be presumed to preclude objective professional judgment.
- Allegations of a conflict of interest may be filed with the UFA-Administration Committee within 10 working days of discovering the conflict.

ALICIA TIP: Perceived COI is just as consequential as actual COI!

- COI assertions and recusal requests may be made directly by a faculty candidate to the FEC reviewer and/or FEC Chair. The reviewer should determine recusal in consultation with the FEC Chair. Disagreement may be resolved by the UFA Admin Committee per CBA Section 10.310.
- Recusal from FEC duties amounts to forfeiture of the right to assess qualification for membership and advancement in a department. All such requests should be made, considered, and determined with due regard.

Full CBA text: <https://www.umt.edu/provost/faculty/CBAs/>

Soliciting & Handling Additional Materials

- Only the FEC chairperson may determine that additional material should be solicited, on behalf of the committee.
- The chairperson must document in writing to FEC members the scope of the materials solicited and the justification for soliciting them.

Sharing materials & the candidate's right to respond

- Solicited materials: shared with the candidate within 5 working days of inclusion; the candidate then has 10 working days to submit a written response, which becomes part of the record.
- Unsolicited materials: can only be used if signed. Signed materials follow the same 5/10-working-day timeline — but unlike solicited materials, carry no expectation of anonymity for their author.

Assertions require evidence

Any assertion made by a faculty candidate needs to be substantiated with evidence.

Full CBA text: <https://www.umt.edu/provost/faculty/CBAs/>

Confidentiality, Appeals & External Reviewers

1

Confidentiality with disclosure

The FEC may gather additional evidence while maintaining confidentiality, but must share any solicited evidence with the faculty member being evaluated.

2

Prompt appeal response

In case of an appeal, the FEC must respond promptly — within 10 working days of receiving the appeal.

3

External reviewers, if used

Unit Standards determine how external letters are solicited and handled for anonymity and confidentiality.

Full CBA text: <https://www.umt.edu/provost/faculty/CBAs/>

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Applying Unit Standards

Alicia Arant

Associate Vice President, Office of Conflict, Resolution, and Policy

Applying Unit Standards

1

Start with your unit's approved standards

Every academic unit has its own written standards for teaching, scholarship, and service. Reference them explicitly — not a generic idea of what each category means.

2

Apply the same bar to every candidate

Use the same standard consistently across all candidates at a given rank in a given year. Inconsistent application is one of the most common grounds for appeal.

3

If standards are silent or ambiguous, say so

Don't improvise a new interpretation. Note the gap explicitly in your recommendation and, if needed, consult your Dean's office before finalizing.

4

Confirm you have the current version

Standards are occasionally revised. If you don't have a current copy for your unit, request one before deliberations begin.

Your unit's standards: <https://www.umt.edu/provost/faculty/unitstandards/default.php>

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Reviewing Non-Tenure Track Faculty

Alicia Arant

Associate Vice President, Office of Conflict, Resolution, and Policy

Policy 350: Non-Tenurable Academic Appointments

Non-Tenure Track (NTT) Faculty: Lecturer, Adjunct, Visiting, Research, and Clinical

- Before an appointment, the College, School, or Department must establish the assignment and formulate a position description specifying the assignment, expectations, FTE ratio, and salary.
- The unit must provide the appointee a copy of the position description, the Unit Standards, and Policy 350.
- Starting in the 2026–2027 evaluation cycle, role descriptions will be encouraged for all Non-Tenure Track faculty evaluations.
- Faculty with no research/creative-activity or service requirements are not evaluated in those areas — though the evaluation will still acknowledge such work if it was actually performed.

Principle of Proportionality

Unit standards should be applied proportionate to a NTT faculty member's role and assigned duties.

NTT Faculty appointments were designed by departments against their unit standards with rank/promotion in mind. (Policy 350)

- **Ex.** Role Description designates .5 FTE to student advising — unit standards regarding service should be adjusted **upward** to account for the faculty member's increased service obligation.
- **Ex.** Role Description designates .2 FTE to research — unit standards should be adjusted **downward** to account for the faculty member's decreased research obligation.

Full CBA text (Policy 350 appears at the end of the UFA & MCFA agreements): <https://www.umd.edu/provost/faculty/CBAs/>

Research Faculty & Split Assignments

Research Faculty — CBA supersedes Unit Standards

If Unit Standards don't address the review of Non-Tenure Track faculty with no research, creative-activity, or service requirements, that absence can't be used punitively against them — the principle of proportionality should be applied to reflect the work outlined in their role description.

Faculty Split Assignments (CBA 10.220)

An individual on a split assignment submits documentation to the unit holding the greatest share of their FTE — or, if evenly split, to the unit that hired them first, or the unit where they're best qualified for full-time service. The FEC chairperson, department chairperson, and dean of the evaluating unit must obtain evaluations from their counterparts in the other units.

Non-Faculty Split Assignments

The FEC process is designed to evaluate faculty work performed in the course and scope of their facultyhood. For those on a non-faculty split appointment — performing faculty duties for an academic department and, separately, non-faculty duties on a non-academic appointment — the FEC process should apply only to the faculty member's facultyhood, **unless** the faculty member specifically chooses to include work performed outside their facultyhood in their IPR. In that case, the FEC Chair, Department Chair, or Dean should solicit an evaluation letter from the individual supervising the faculty member's non-academic work.

Full CBA text: <https://www.umt.edu/provost/faculty/CBAs/>

UP NEXT

Writing Recommendations

Alicia Arant

Associate Vice President, Office of Conflict, Resolution, and Policy

Writing Recommendations

1

Structure around the required elements

Address retention, salary increment, promotion, and tenure — whichever apply to the candidate — as separate, clearly labeled sections.

2

Ground every conclusion in submitted evidence

Tie each conclusion back to specific materials in the candidate's IPR. Vague or unsupported statements are the most common source of appeals.

3

Write for more than one audience

Your recommendation will be read by the candidate and by every later reviewer — Chair, Dean, Provost. Make it complete enough to stand on its own.

4

Avoid last cycle's most common pitfalls

Vague language ("generally strong"), missing identifying information, and unaddressed categories were the top issues we saw.