

Geography Career and Pro Tem Review and Promotion

Career and Pro Tem Faculty Review and Promotion
Department of Geography
University of Oregon
(Passed by the Department of Geography on 7 February 2022)
Approved by the Office of the Provost May 10, 2022

This policy applies to all represented faculty and is intended to comply with all provisions of Article 19 of the CBA. To the extent there are any discrepancies or inconsistencies, CBA Article 19 controls for represented faculty. This policy also applies to all unrepresented faculty, unless a university-wide policy exists that contradicts the terms of this policy.

If review or promotion procedures change during the course of a faculty member's employment, they may elect between current criteria and those in effect during the six years prior to the initiation of a given review or promotion process.

- I. Instructional Career Faculty (CF) Reviews
 - A. Career Faculty will be reviewed annually for performance in their first three years of employment and then at least every three years after that. The review will consider the faculty member's performance since the last review.
 - B. CF members will be evaluated only by the criteria approved and made available to the faculty member. CF will be evaluated on the quality of their teaching and on their service/professional development/scholarship in proportion to the FTE afforded to those aspects in their job description.
 - C. If a faculty member seeks promotion in a year when a performance review is due, only a single review must be completed.
 - D. For performance reviews, the faculty member will submit a curriculum vitae and a personal statement containing information relevant to their performance of assigned duties and responsibilities.
 - E. The following elements will be considered in evaluating teaching:
 - a. Information from Student Experience Surveys for all courses with five or more students.
 - b. At least one peer evaluation of teaching per year for the first three years and then one peer review of teaching every three years. The peer evaluation should include an examination of the faculty member's syllabus and other materials for the course being evaluated and the observation of at least one class. The time frame for this review will be established through discussion with the CF member; at least one week of advance notice will be provided.
 - c. Evidence of contributions to enhanced teaching through curriculum development, innovative teaching techniques, and/or course supervision.
 - d. The faculty member's personal statement (see below).
 - F. The following elements will be considered in evaluating service.
 - a. Evidence of department service.

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- b. Evidence of college service.
 - c. Evidence of university service.
 - d. Evidence of community or professional service.
 - G. If a faculty member has been assigned specific service duties in place of some teaching, their performance of those duties will also be evaluated in proportion to the FTE afforded to those duties.
 - H. To the extent applicable, the evaluation of scholarship, research, and creative activity will include an assessment of work quality, impact on the field nationally and internationally, and overall contribution to the discipline or program.
 - I. In evaluating the performance of required professional development activities, the review will consider the availability of professional development funds, opportunities for professional development, and the Career Faculty member's efforts to secure funding.
 - J. Career Faculty will be notified in the fall of the academic year in which their review will occur. At that point, they will be invited to submit a CV and personal statement. If a faculty member wishes to submit a CV and personal statement, it must be submitted by Monday of the third week of winter term.
 - K. The review will be conducted by the department head or designee and department Personnel Committee. The department head will then forward the review materials with evaluation to the College of Arts and Sciences.
 - L. The review should be completed by three weeks before the due dates in the College of Arts and Sciences (CAS). The faculty member will be given the opportunity to discuss their efforts, performance, and review with their department head or designee. The department head will then forward the performance review to CAS.
- II. Instructional Career Faculty Promotion Reviews
- A. Criteria for promotion to Senior Instructor I and Senior Lecturer I are based on a sustained record of performance in the responsibilities of Instructor or Lecturer, as delineated in the relevant job descriptions. These might include teaching that meets or exceeds expectations, as well as evidence of instructional, supervisory, and/or service leadership. Such activities could include mentoring other instructors, coordinating multi-section courses, participating in professional development opportunities, and developing effective and innovative curricula, organizational structures, and pedagogical techniques.
 - B. Criteria for promotion to Senior Instructor II and Senior Lecturer II are based on a sustained record of performance that meets or exceeds expectations in the responsibilities of Senior Instructor I or Senior Lecturer I, as delineated in the relevant job descriptions.
 - C. Candidates wishing to be considered for promotion should notify the appropriate department or unit head in the Spring term prior to the year when promotion is sought, and must provide the following:

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- a. A comprehensive and current signed and dated curriculum vitae that includes the faculty member's current instructional work and other activities that relate to job performance.
 - b. A 2-6 page signed and dated personal statement developed by the faculty member evaluating their performance measured against the applicable criteria for promotion. The personal statement should expressly address the teaching, other instruction-related activities, professional development, and service contributions to the academic department, college, university, profession and community. The statement should also include discussion of contributions to institutional equity and inclusion.
 - c. A signed and dated waiver. A faculty member may choose in advance in writing whether they wish to waive or retain access to any or all of the evaluative materials. Waivers shall not preclude the use of redacted versions of these documents in a denial review process. The redacted versions are intended to protect the identity of the reviewers. If redactions are insufficient to do so, the university may prepare a suitable summary.
 - d. Teaching portfolio: This may include representative course syllabi, examples of exams, handouts, assignments, and of student work.
 - e. Service portfolio: An account of the faculty member's service contributions to their academic department, college, university, profession, and community. This may contain samples and/or narrative describing the service. It may be subsumed into the curriculum vitae if appropriate
- D. The promotion review will be conducted by the department Personnel Committee. The committee will whenever possible include TTF and/or Career Faculty, who are at the same or higher rank than the rank the candidate is seeking. Career Faculty colleagues of appropriate rank from other units may be invited to serve on the committee. The committee decides whether or not internal and/or external reviews (over and above supervisors' evaluations) will be used in a given promotion case. The use of such reviewers and the process for their selection will be discussed with the candidate in advance of solicitation of reviewers. External reviewers will be selected using standard University guidelines and recommendations and consistent with the general expectations enumerated in Article 20, Section 14 of the CBA.

- The committee will review the promotion case and prepare a recommendation with a voting summary by three weeks before the due dates in the College of Arts and Sciences. This review will be based on the criteria for promotion as formulated by the department or program, the promotion review file, and material that has been considered in contract renewal reviews. This report will be submitted to the department or program for discussion and a vote. Voting members will include all TTF and all Career Faculty at the rank or above of the rank sought by the candidate for promotion. The department head will then prepare an independent report on the merits of the promotion case, with their own recommendation. The faculty member will be given the opportunity to discuss their efforts, performance, and review with their supervisor.
- E. The file, including the committee report, the department or unit's voting summary, and the head's independent report and recommendation will then be sent to the

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appropriate associate dean in the College of Arts and Sciences by one week before the due dates in the College of Arts and Sciences.

- F. Reapplication for Promotion. Unsuccessful candidates for promotion may continue at current rank as long as eligible under the Collective Bargaining Agreement and university policy. They may reapply for promotion after employment by the university for an additional 3 years at an average of 0.3 FTE or greater, accrued at no greater than 3 terms per academic year.
- G. Appeal of Promotion Denial. Unsuccessful candidates may appeal as provided by Article 21 (Tenure and Promotion Denial Appeal) or other university appeals processes which apply to faculty not covered by the CBA.
- H. Withdrawal of Application. A candidate can withdraw their application for promotion in writing to the provost and the dean at any time before the Provost's decision.

III. Research Career Faculty Reviews

- A. Research Career Faculty will be reviewed annually for their first three years and once every three years thereafter. The review will consider the faculty member's performance since the last review.
- B. Research Career Faculty members will be evaluated only by the criteria approved and made available to the research faculty member. Research Career Faculty will be evaluated on the quality of their research, teaching, and on their service/professional development/scholarship in proportion to the FTE afforded to those aspects in their job description.
- C. If a research faculty member seeks promotion in a year when a promotion review is due, only a single review must be completed.
- D. For performance reviews, the research faculty member will submit to the Department Head a curriculum vitae and a personal statement containing information relevant to their performance of assigned duties and responsibilities.
- E. Close to the beginning of each review period or more frequently, when necessary, the Research CF and their supervisor meet and discuss strengths in the member's past performance, areas of improvement, as well as goals for the next review period, taking also into consideration the types of activities required in the context of the sponsored project that funds the research faculty member. The supervisor summarizes the result of the meeting in a "Professional Goals" statement, which the member signs to acknowledge that they have read it. The purpose of this statement is to help providing clear expectations regarding the evaluation of the member's research activities during both performance and promotion reviews. The supervisor and the research faculty member should sign the supervisor's evaluation. The research faculty member's signature acknowledges receipt of the evaluation; it does not indicate agreement with the evaluation. Research Faculty may also provide a response or addendum to the evaluation.
- F. For performance reviews, the research faculty member submits a curriculum vitae and a personal statement containing information relevant to their performance of assigned duties and responsibilities to the Department Head.

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- G. The annual evaluation is based upon the material submitted by the research faculty member, their professional responsibilities as described the position description and the Professional Goals statement relevant for the year under review. Because the research faculty are funded by sponsored projects, evaluations should reflect the kind of activities that the faculty have been funded to do.
- H. For each research faculty member being reviewed, the supervisor will provide the department head or designee with a current job description, the currently relevant Professional Goals statement, all of the documents provided to them by the research faculty member, and a completed, signed evaluation.
- I. Documents provided by the research faculty member and their supervisor will be placed in the faculty member's personnel file.
- J. The following elements will be considered in evaluating service.
 - a. Evidence of department service.
 - b. Evidence of college service.
 - c. Evidence of university service.
 - d. Evidence of community or professional service.
- M. To the extent applicable, the evaluation of scholarship, research (including publications and grantsmanship), and creative activity will include an assessment of work quality, impact on the field nationally and internationally, and overall contribution to the discipline or program.
- N. In evaluating the performance of required professional development activities, the review will consider the availability of professional development funds, opportunities for professional development, and the CF member's efforts to secure funding.
- O. Career Faculty will be notified in the fall of the academic year in which their review will occur. At that point, they will be invited to submit a CV and personal statement. If a faculty member wishes to submit a CV and personal statement, it must be submitted by Monday of the third week of winter term.
- P. The review will be conducted by the department head or designee and department Personnel Committee. The department or program head will then forward the review materials with their report and recommendation materials to the College of Arts and Sciences.
- Q. The review should be completed by three weeks before the due dates in the College of Arts and Sciences (CAS). The faculty member will be given the opportunity to discuss their efforts, performance, and review with their department head or designee. The department head will then forward the performance review to CAS.

IV. Research Career Faculty Promotion Reviews

- A. Promotion is not an automatic process, awarded for years in rank, but rather is awarded for merit.
- B. Opportunities for promotion-relevant activities vary across Research CF positions. Position-specific criteria will be based on the most important core professional responsibilities as described in a faculty member's position description as well as the

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- annual Professional Goals statements and will accommodate a wide range of research and evaluation methods, scholarly approaches, and technical contributions to diverse disciplinary outlets. Because research faculty are funded by sponsored projects, these evaluations will also reflect the kind of activities that they have been funded to do.
- C. Criteria for promotion to Senior Research Assistant I and II are based on the candidate exhibiting high proficiency in their primary research responsibilities and duties. Examples include, but are not limited to, innovative solutions to problems, successful efforts in standardizing materials and/or processes, or the successful mastery of new skills. The candidate must also contribute service activities, mainly within the department.
 - D. Criteria for promotion to Senior Research Associate I and II are based on the candidate documenting a sustained and broader set of skills, beyond exhibiting high proficiency in primary research responsibilities and duties (see item C). Examples include, but are not limited to, supervisory and leadership functions within their units. The candidate must also contribute service activities, mainly within the department, proportional to the FTE afforded to those aspects in their job description.
 - E. Criteria for promotion to Associate Research Professor and Research Professor are comparable to criteria for tenure-track faculty, including national and/or international impact of their scholarship and/or of external funding, as well as service on the national and/or international level (e.g., service in professional organization, as journal reviewer or editor, or as member of grant review panel). The candidate must also contribute service activities proportional to the FTE afforded to those aspects in their job description.
 - F. In evaluating the performance of required professional development activities, the review will consider the availability of professional development funds, opportunities for professional development, and the Career Faculty member's efforts to secure funding.
 - G. All research faculty are expected to document contributions to the University's goals regarding equity and inclusion.
 - H. As specified in the CBA, Research Career Faculty will be eligible for promotion after accumulating six years of service in rank at an average of 0.3 FTE or greater, accrued at no greater than three terms per academic year for faculty on nine-month appointments and at four terms per year for faculty on 12-month appointments. The review will consider the faculty member's performance since hiring or since the previous promotion.
 - I. A faculty member must notify the director of their desire to seek promotion in the Spring term of the year prior to seeking promotion. This should typically be done as part of the annual review process, but may occur as late as June 15. The department head or designee is responsible for developing and communicating unit deadlines to promotion candidates and their supervisors well in advance of deadlines. The exact timeline may vary from year to year depending on the number of candidates being considered for promotion. Complete promotion files must be submitted to the College of Arts and Sciences one week before the due dates of the year in which promotion is sought.
 - J. For Research CF, promotion is elective and does not involve an "up or out" decision. Research Career Faculty may be reappointed at their current rank if they are not promoted or not considered for promotion.

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- K. An accelerated promotion review may occur in particularly meritorious cases as determined by the Provost or designee in consultation with the dean, department head, and faculty member. When credit for prior service is agreed upon at the time of hire, it states the earliest date of promotion. Work done by the research faculty member during the period of prior service will receive full consideration during the promotion process if the faculty member elects the earliest date for promotion review. Should the research faculty member choose to use some, but not all of the credit for prior service, the focus of the review will adjust appropriately.
- L. Candidates wishing to be considered for promotion must provide the following items:
- a. A comprehensive and current signed and dated curriculum vitae that includes the research faculty member's current research work and other activities that relate to job performance.
 - b. A 2-6 page signed and dated personal statement developed by the research faculty member evaluating their performance measured against the applicable criteria for promotion. The personal statement should expressly research-related activities, professional development, if applicable, scholarly activities, and service contributions to the academic department, college, university, profession and community. The statement should also include discussion of contributions to institutional equity and inclusion.
 - c. A portfolio of research-related activities (e.g., products that were created in the context of the research activity).
 - d. If applicable, the candidate will also provide a portfolio of scholarly activities (e.g., published manuscripts).
 - e. A signed and dated waiver. A faculty member may choose in advance in writing whether they wish to waive or retain access to any or all of the evaluative materials. Waivers shall not preclude the use of redacted versions of these documents in a denial review process. The redacted versions are intended to protect the identity of the reviewers. If redactions are insufficient to do so, the university may prepare a suitable summary.
- M. The department head appoints a promotion review committee as well as a committee chair. Including the chair, the committee consists of 2-3 members. The committee cannot include the candidate's immediate supervisor; however, the supervisor will provide an evaluation letter. The committee will include at least one research CF member of the appropriate rank, if such a faculty member is available. In the event that there are not enough members of the Department of Geography at the appropriate rank to make up a committee, the department head may appoint appropriate faculty members from other units. The committee will review the promotion case and prepare a recommendation to the department head with a voting summary. This review will be based on the criteria for promotion as formulated by the department, the promotion review file, and material that has been considered in contract renewal reviews. This review will be submitted to the department or program for discussion and a vote. Voting members will include all TTF and all CF at the rank or above of the rank sought by the candidate for promotion. The department or unit head will then prepare an independent evaluation letter that includes the voting summaries of the committee as well as the department.

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- N. The type and quantity of additional reviewers will be determined on a case-by-case basis. Prior to embarking on obtaining reviews, the committee chair will discuss with the OVPRI the candidate and their job duties and propose a plan regarding the type and quantity of reviews, and the OVPRI about the type and quantity of reviews. The department head manages the process of obtaining supervisor's evaluation, and internal and external reviews:
- a. Review for promotion to Senior Research Assistant I and Senior Research Assistant II will only include internal reviews, if these can be expected to contribute independent information, beyond the supervisor's evaluation.
 - b. Candidates for promotion to Research Associate I and Research Associate II whose job duties include expectations of having impact beyond a small research team, can have internal and also external reviews. Candidates who are largely part of teams with no expectations of independent impact may include internal reviews, if these can be expected to contribute independent information, beyond the supervisor's evaluation.
 - c. Promotions to Associate Research Professor and Research Professor will have external reviews but may also include internal reviews.
 - d. External reviewers will be selected using standard University guidelines and recommendations and consistent with the general expectations enumerated in Article 20, Section 14 of the CBA.
- O. The complete promotion file includes:
- a. A statement of the conditions of appointment, a statement of the duties and responsibilities as derived from the position description, and of criteria for promotion for the position in question
 - b. All items provided by the candidate (see L.a to L.e)
 - c. The supervisor's letter of evaluation
 - d. If applicable, internal and/or external reviews, including a list of all reviewers
 - e. The promotion committee's recommendation
 - f. The department head's recommendation
- P. Reapplication for Promotion. An unsuccessful candidate for promotion may continue employment at the current rank as long as eligible to do so under the CBA and university policy. Career Faculty who are denied promotion may reapply for promotion after having been employed by the university for an additional three years at an average of 0.3 FTE or greater, accrued at no greater than three terms per academic year.
- Q. Appeal of Promotion Denial. Unsuccessful candidates may appeal as provided by Article 21 (Tenure and Promotion Denial Appeal) or other university appeals processes which apply to faculty not covered by the CBA.
- R. Withdrawal of Application. A candidate may withdraw their application for promotion in writing to Office of the Vice President of Research and Innovation (OVPRI).
- V. Pro Tem faculty Reviews
- A. The instructional contributions of pro tem faculty will be reviewed in each contract period.

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- B. Instructional and research pro tem faculty must receive a performance review annually. The review should be done during Spring term and is due to CAS prior to submitting a contract renewal and no later than the due date listed. See the CASweb calendar for current year due date. Use the NTTF (Pro Tem and Career) Evaluation Template located under Documents.
- C. The review is presented to the employee, who must sign the statement at the bottom of the template, then the department sends a copy to the Dean's Office.
- D. The time frame for this review will be established through discussion with the pro tem faculty member; at least one week of advance notice will be provided.