

Learning Design and Innovations Promotion and Tenure Standards

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1. Preamble

1.1 Purpose of Standards Document

The purpose of this standards document is to provide guidance to faculty members as they prepare for applications for tenure and/or promotion. Achieving tenure and promotion through the ranks is based on incremental and accumulative growth of a faculty member in their scholarship, professional role, and in service. To merit tenure or promotion, faculty members will have their performance assessed for effectiveness in professional role; recognized research, scholarly and creative work; and contributions to service within the university and general community as well as to the profession (locally, nationally, and internationally). These Departmental guidelines describe the standards and expectations specific to the Department of Learning Design and Innovations. University guidelines as detailed in the Senate-approved *Principles and Essential Features of Standards and Collective Agreement* provisions shall guide all such standards and expectations. In particular, applicants should document clear evidence of the following:

- That they have achieved “incremental and accumulative growth” as professionals/teachers and/or researchers, and in terms of departmental, university, community, and disciplinary service,
- That they have met increasing expectations for professional role, research, and service, recognizing that as faculty move through the ranks, there should be documented evidence of increasing levels of performance in all areas,
- That they have achieved recognition and assessment by peers at local, national, or international levels, documenting an increasing sphere of influence,
- That their work can be assessed in terms of its quantity, quality, and impact.

The intent of the Learning Design and Innovations Department’s standards and criteria is to be supportive of faculty as they work towards career goals. This document sets out standards that are realistic and achievable and provides examples of criteria for the evaluation of excellence within each of professional role, scholarship, and service, thus allowing faculty options in the design of their career path. **The criteria are not exhaustive, nor are they to be used as a checklist that must be completed. The criteria provide examples of objective evidence that can be used to judge excellence.**

1.2 Definitions of Work in the Learning Design and Innovations Department

The Learning Design and Innovations Department (LDI) is a diverse department whose members support quality teaching and learning, providing expertise in instructional design, educational technologies, faculty development, curriculum development, and the scholarship of teaching and learning. In these roles, we provide guidance on pedagogical practice in a variety of modalities and multiple disciplinary and interdisciplinary contexts.

We support other faculty members in their teaching and learning practice and take a scholarly approach to our professional practice, grounded in theoretical frameworks from multiple fields, including education, curriculum, technology-enhanced learning, open and distance education and digital practices and pedagogies. We value a variety of work in professional and disciplinary fields, across multiple bodies of knowledge, and in diverse delivery modes.

The production of knowledge and influence can take many forms and is evaluated according to a variety of scholarly and/or professional standards. As such, this standards document asserts a commitment to widen rather than narrow the bases of evaluation of scholarly and professional work by faculty in LDI.

1.3 Equity, Diversity, and Inclusion

The spirit of this document is supportive in setting out standards empowering faculty for career success. The Learning Design and Innovations Department defines equity with respect to tenure and promotion as the removal of systemic barriers and biases to enact the practice of inclusion so that all individuals have equal access to and can benefit from the protections and privileges of tenure. As such, the following document has been written to be interpreted in a necessarily encompassing and flexible manner in consideration of a candidate's circumstances. Where this document references "significance," the Learning Design and Innovations Department expects candidates to define significance within their own contexts.

The Learning Design and Innovations Department recognizes the value of service within the institution, as well as the disproportionate service load traditionally undertaken by faculty from equity-seeking groups. As such, the Learning Design and Innovations Department considers the appropriate recognition of service to be an equity issue. The Department recommends candidates submit a Service Dossier with their application to demonstrate how their commitment to service contributes to the narrative of their careers.

The Learning Design and Innovations Department recognizes that ensuring equity, diversity, and inclusion requires flexibility and accommodation of career interruptions and special circumstances. Where it is necessary, candidates are invited to include a Statement of Circumstances within their application. Relevant circumstances may include, but are not limited to, administrative responsibilities, maternity/parental leave, child-rearing, dependent care, illness, disability, cultural or community responsibilities, or socio-economic context. Tenure and promotion committees are strongly encouraged to consider career interruptions and special circumstances in order to more accurately assess affected applicants' records of achievements.

The production of knowledge and influence can take many forms and is evaluated according to a variety of scholarly and/or professional standards, including recognition of the diversity of communication and systems of knowledge of Indigenous Peoples. As such, this standards document asserts a commitment to widen rather than narrow the bases of evaluation of scholarly and professional work by faculty in the Learning Design and Innovations Department. As such, the Learning Design and Innovations Department equitably recognizes excellence across the broadest spectrum of applied, practice-led,

strategic, and academic research practices and outputs. The Learning Design and Innovations Department subscribes to an inclusive definition of how scholarship may be disseminated and acknowledges the multiple paths and forms that scholarly research and dissemination take, as well as the relational accountabilities that guide the research process, particularly with, and by, members of marginalized, equity seeking, and under-represented groups.

In this light, candidates are encouraged to highlight throughout their portfolio how they have embraced the principles of equity, diversity, inclusion (EDI), decolonization, and Indigenization.

2. Assessment Criteria

The assessment criteria for appointment, tenure and promotion depend on the type of position, tripartite or bipartite. For tripartite positions the assessment criteria are: academic qualifications, professional role, scholarship, and service; while for bipartite positions the criteria are academic qualifications, professional role, and service. Although the degree to which particular faculty members will make contributions in each of professional role, scholarship [for tripartite faculty] and service may be expected to differ, particularly at different stages in their academic careers, it is the Department's expectation that all members, and particularly tenured members, will over time, make substantive contributions in professional role, scholarship [for tripartite faculty], and service. Appointment, tenure and promotion decisions will be guided by this expectation.

2.1 Academic Qualifications

Candidates for appointment, tenure and promotion in the Department must meet the qualifications for the position.¹ For a bipartite position, a relevant Master's degree is the normal qualification. For a tripartite position, the terminal degree, typically an earned doctorate, in a relevant discipline is the normal qualification. Nevertheless, it is recognized that professional experience is vital throughout the Department and that candidates with doctorates may not be widely available within some fields within the Department. Consequently, equivalent qualifications may be demonstrated through an appropriate combination of other academic credentials; professional credentials; and professional, teaching and research experience that is judged to be directly relevant.

2.2 Weighting of Roles and Responsibilities

Whether for appointment, tenure or promotion, there are important differences between bipartite and tripartite positions in the relative weighting of evidence that reflect the different roles and responsibilities that these positions entail. Normally, bipartite faculty applications will be evaluated primarily on their core responsibility, professional role, while tripartite faculty applications will be evaluated primarily on their core responsibilities, professional role and scholarship. The assessment of both bipartite and tripartite applications normally depends to a lesser degree on service than their respective core areas.

¹ The qualifications pertaining to appointment and promotion are normally those currently in place, while the qualifications pertaining to tenure are normally those that were in place at the time of the candidate's appointment.

Within the Department, individual applicants for tenure and promotion may suggest weightings of their relevant categories to be used in evaluating their applications within the parameters articulated below.

Tripartite Positions	
Roles and Responsibilities	Weighting
(a) Professional role (Core)	30-40%
(b) Scholarship (Core)	30-40%
(c) Service	20-30%

Bipartite Positions	
Roles and Responsibilities	Weighting
(a) Professional role (Core)	70-80%
(b) Service	20-30%

Within these limits, extraordinary contributions in an area of greater involvement may balance with lesser involvement in another area provided that, adjusted for weights, the applicable standard has been achieved in all areas.

For its part, the Department Promotion and Tenure Committee will recognize that the weights across activities may differ based on individual circumstances and may vary over an individual's career. These weights represent the balance among the evidence presented and do not necessarily reflect the applicant's workload. Given the applicable weights for each of a candidate's roles and responsibilities, as well as the candidate's qualifications, the Department Promotion and Tenure Committee will determine whether the candidate meets the standards or does not meet the standards for tenure and/or promotion. An application is successful if and only if the candidate meets the standards in all areas. To provide greater clarity, the Committee may also determine that a candidate exceeds the standards in one or more of the areas. Exceeding the standards in some areas, however, cannot compensate for not meeting the standards in others.

2.3 Assessment of Collaborative Work and Collegial Endeavour

Collaborative efforts in professional role, scholarship and service are to be encouraged because they enhance faculty contributions to the Department, Division/School and University. One important implication is that in assessing faculty accomplishments for appointment, promotion and tenure, joint endeavours in each of professional role, scholarship and service should frequently be counted such that the sum of individual contributions is greater than unity. In the case of collaborative work, the specific contribution of the candidate must be documented.

It is recognized that the activities of the Department and the self-governance of the Department, Division/School and the University require a high degree of cooperation

between colleagues. While collegiality *per se* is not a separate evaluation item in addition to service, professional role and research, collegiality is an intrinsic component to the assessment of these items and particularly to the assessment of service and professional role. Accordingly, tenure and promotion applications are expected to provide evidence of collaborative/collegial contributions to service and professional role.

2.4 Assessment of the Professional Role

The Learning Design and Innovations Department believes teaching-learning is a dynamic process that occurs in a variety of settings. Our professional roles involve attention to course work, course design, methods of teaching, curriculum development and other instructional related activities. In addition, we recognize that quality learning environments are essential for learning. A primary purpose of the professional roles of Department members is support of quality teaching and learning environments.

It is the expectation that all faculty will take a scholarly approach to their professional role regardless of whether one has a bipartite or tripartite appointment. Although a scholarly approach to a professional role and the scholarship relating to that professional role are closely connected, they differ in both intent and outcome. The intent of a scholarly approach is “maximizing learning through effective teaching” or professional role (Potter & Kustra, 2011, p. 3). The intent of the scholarship of the professional role is to create, advance, or transform the knowledge about the profession through a rigorous investigative process. The product that results from this process:

- may be consistent with any of the four domains of scholarship outlined in Boyer’s model of scholarship,
- is subjected to peer review,
- is disseminated to the professional/academic community.

2.4.1 Professional Role Dossiers – Bipartite and Tripartite Positions

Candidates for tenure and/or promotion *must* submit a professional role dossier that demonstrates effectiveness in their professional role at the appropriate level of performance required by the Department. The following are essential components that must be included in the professional role dossier.

List 2.4.1: Essential Components of the Professional Role Dossier

- *Statement of Professional Role Philosophy:* Includes pedagogical goals and objectives.
- *Overview of Professional Development:* Includes activities in the area of the professional role that are planned or ongoing as well as those completed.
- *Overview of Professional Duties:* This will vary by role, but may include a list of courses developed, workshops offered, consultations held, or outline of support activities undertaken. Any other contributions completed in service of the professional role may also be included here.
- *Portfolio of Materials:* At a minimum, includes a sample of selected contributions undertaken with accompanying discussion indicating development and learning, updates, revisions, and new materials during the period under review.

- *Portfolio of Peer Feedback*: At a minimum, includes written peer observations from recent years that meet the requirements of both the Collective Agreement and senate-approved TRU policy.
- *Overview of Student Supervision*: Where applicable, includes a listing of individual student projects supervised (e.g. honours theses or similar individually-supervised projects, master's theses) at TRU or elsewhere, if any, which indicates whether completed or in progress, and the nature of involvement (e.g., principal advisor, second reader, external examiner).

Where the above list states “at a minimum” and calls for “samples” of items, candidates should bear in mind that it is important to provide sufficiently comprehensive information for external referees as well as promotion and tenure committees to report an assessment of performance with reasonable confidence.

Additional components should be included in the Professional Role Dossier so as to provide a complete account of the activities listed below. For further details on the essential components of the professional role dossier and suggestions of possible additional components, see Article 6 – Appendix 1, of the Collective Agreement.

2.4.2 Metrics for the Assessment of Professional Role – Bipartite and Tripartite Positions

The following list, while not exhaustive, indicates individual activities that can enter into the assessment of the professional role in support of tenure and/or promotion.

List 2.4.2(a): Individual Professional Role Activities

- Course development, workshop development, and/or support activities, as well as the preparation and revision of necessary materials.
- Supplementary internal roles related to the professional role area including peer review of or consultation with colleagues, teaching, frequent guest lecturing, etc.
- Additional or external roles related to the professional role area.
- Student supervision, as appropriate.
- Capacity building and mentorship of colleagues.
- Participation in professional development activity in the professional area including peer seminars, workshops, colloquia, conferences, etc.
- Development/adoption of new/innovative teaching and learning techniques, resources, technologies, materials, aids, etc.

Leadership and/or scholarship in the professional role area are elements of the professional role within the Department that become increasingly important as both tripartite and bipartite faculty members move through the ranks. Activities in leadership, teaching and/or scholarship in the professional role area that can enter into the assessment of professional role in support of tenure and/or are given in the following two non-exhaustive lists.²

² Tripartite faculty members may elect to count appropriate contributions to the scholarship of professional role as scholarship rather than professional role if it is to their advantage. In many cases it will be relevant for

List 2.4.2(b): Leadership in the Professional Role

- Professional role outreach making specialized knowledge more broadly accessible and usable to university faculty and learners in other disciplines and the community through public workshops, lectures seminars, etc.
- Improving teaching and learning within a discipline or across disciplines through the development or redevelopment of course or support materials.
- Developing new/innovative teaching and learning techniques, resources, technologies, materials, aids, etc.
- Significant coordination role.
- Leadership in professional development activities in the area of the professional role including peer seminars, workshops, colloquia, conferences, etc.
- Liaison with other post-secondary institutions or scholarly organizations.
- Significant external leadership roles with educational agencies and organizations.
- Other leadership roles as a resource person, mentor in teaching and learning strategies, disciplinary or interdisciplinary engagement, etc.
- Appropriate consulting work (e.g., where there is a contribution to professional development in teaching and learning).
- Leadership on internal or external projects in support of teaching and learning, including course and program reviews, quality assurance assessments, etc.
- Awards or public recognition for excellence and/or innovations in the area of the professional role.

List 2.4.2(c): Scholarship in the Professional Role

- The development and dissemination of open pedagogies, platforms, and materials.
- The application of scholarship related to the professional role.
- The dissemination of investigations, reflections or other research on the professional role area in peer-reviewed, and particularly open access, outlets including journal articles, books, book chapters, conference proceedings, chapters, etc.
- The dissemination of case studies, professional articles, professional exams, etc. in journals, textbooks, magazines, professional bodies' websites, etc.
- Disseminating new/innovative teaching and learning techniques, resources, technologies, materials, aids, etc.
- Invited or peer-reviewed presentations of investigations, reflections or other research on the professional role area at conferences, workshops, seminar series, etc.
- The dissemination of investigations, reflections or other research in the professional role area in non-peer-reviewed outlets including magazines, websites, social media, podcasts, blogs, etc.
- Internal and external grants directed at the scholarship of the professional role area.
- Editorship of a journal or book related to the scholarship of the professional role area.
- Acting as a reviewer for a journal related to the scholarship of the professional role area.

bipartite faculty members to include publications and scholarship that make contributions to the discipline as well as to pedagogy under the heading of the scholarship of professional role.

- Citations of published work related to the scholarship of the professional role area.
- Textbook reviews.

A candidate's professional role dossier should include documentation of all relevant activities applicable to Lists 2.4.2(a), (b) and/or (c).

2.4.3 Levels of Performance for Professional Role – Tripartite and Bipartite Positions

For attaining tenure and progressing through the ranks, there are **increasing expectations** for performance and contributions in professional role and related areas. **Incremental and accumulative growth** must be demonstrated. Clear and compelling evidence must be provided to allow the candidate's professional role to be assessed in terms of **quantity, quality, and impact**.

The quantitative and/or qualitative requirements in the performance levels specified below are more comprehensive for bipartite faculty members than tripartite faculty members to the extent that professional role is weighted more heavily for bipartite faculty members. Further, bipartite faculty are expected to establish their local, national or international spheres of influence primarily in the area of professional role.

- **Professional Role Potential:** Candidates for an initial appointment as an Assistant Professor or Instructional Support I must show evidence of potential for effectiveness in the professional role. Clear oral and written communication skills are essential aspects of potential in the professional role area.
- **Satisfactory Trajectory for the Professional Role:** Pre-tenure faculty members who were initially appointed as Assistant Professors or Instructional Support I must have established a satisfactory trajectory in the professional role area for the purposes of the three-year review of their appointments. At a minimum, this means showing evidence that they are on track to achieve the performance level of "Satisfactory Performance in the Professional Role" (described below) by the time of their assessment for tenure. In addition to evidence of such initial potential in the professional area, there must be clear potential for professional growth and the promise of future development.
- **Satisfactory Performance in the Professional Role:** A **bipartite** or **tripartite** candidate for tenure who was initially appointed as an Assistant Professor or Instructional Support I must have established a satisfactory record as in the professional role. In addition to consistent evidence, which includes notable activities from list 2.4.2(a), a candidate must demonstrate clear professional growth and the promise of future development.

Additionally, the performance and professional contributions of **bipartite candidates for tenure** must be **recognized and assessed at a local/regional level**.³ Consequently, a **bipartite** candidate for tenure will normally provide evidence of four to six significant activities applicable to Lists 2.4.2(b) and/or 2.4.2(c) on leadership and/or scholarship in the professional role area.

³ In contrast, a tripartite candidate for tenure establishes a local or regional sphere of influence primarily through scholarship.

- *Superior Performance in the Professional Role:* A candidate for Associate Professor or *Instructional Support II* must provide solid evidence of superior performance in the professional role. The candidate's professional role dossier should include documentation of notable activities applicable to Lists 2.4.2(b) and/or 2.4.2(c) as well as list 2.4.2(a) going clearly beyond the requirements for satisfactory performance, thereby providing evidence of consistent and expanding involvement with pedagogy-related work.

Additionally, the performance and professional contributions of candidates for *Instructional Support II* must be ***recognized and assessed at a national level.***⁴ Consequently, a candidate for *Instructional Support II* will have an on-going record over the career to date that normally provides evidence of six to eight significant activities in the areas of leadership and/or scholarship in the professional role area as outlined by Lists 2.4.2(b) and 2.4.2(c).

- *Outstanding Performance in the Professional Area:* A candidate for Professor or *Instructional Support III* must provide solid evidence of outstanding performance in the professional role. The candidate's profile should include documentation of notable items applicable to Lists 2.4.2(b) and/or 2.4.2(c) as well as List 2.4.2(a) going clearly beyond the requirements for superior performance, thereby providing evidence of substantive additional involvement with pedagogy-related work.

Additionally, the performance and professional contributions of candidates for *Instructional Support III* must be ***recognized and assessed at an international level.***⁵ Consequently, a candidate for *Instructional Support III* will have an on-going professional role record over the career to date that normally provides evidence of a minimum of ten significant activities in the areas of leadership and/or scholarship in the professional role area as outlined by Lists 2.4.2(b) and 2.4.2(c).

2.5 Assessment of Scholarship

Scholarship is defined as research and scholarly work which is creative and intellectual. Such work can occur through discovery, integration, teaching and learning, or application of knowledge and must be disseminated within the public domain.⁶ The Department recognizes that specialization and exchange in scholarship and publication allow collaborating faculty to be more productive, jointly producing work of superior quantity and quality than would be possible for the same individuals working in isolation.

⁴ See the “Principles and Essential Features of Standards Documents” (2007). In contrast, a candidate for Associate Professor establishes a national sphere of influence primarily through scholarship.

⁵ See the “Principles and Essential Features of Standards Documents” (2007). In contrast, a candidate for Professor establishes an international sphere of influence primarily through scholarship.

⁶ See Boyer (1990).

2.5.1 Research Dossiers – Tripartite Positions

While not specifically required in the *Collective Agreement*, the Department recommends that tripartite candidates for tenure and/or promotion include a “research dossier.” In addition to specific evidence pertaining to research, such a dossier should include a summary of the candidate’s research agenda, its evolution and its planned future directions.

2.5.2 Metrics for the Assessment of Scholarship – Tripartite Positions

The following lists of types of scholarly activities – while not exhaustive – indicate primary and secondary types of contributions that can be used as evidence to assess scholarship in support of applications for tenure and/or promotion. We would like to emphasise the importance of dissemination that supports open and collaborative practice, including open-access publishing, the development of Open Education Resources and texts, and the creation, documentation and sharing of open process and/or open data.

The Department strongly encourages faculty members to make scholarly contributions of the highest caliber. Accordingly, in the evaluation of scholarly activity, the quality and sphere of influence of the work, not just the sheer quantity, is of paramount importance. In the case of collaborative work, the contribution of the candidate must be documented. The Department also strongly encourages faculty members to seek and secure internal and external research grants because such funding is often important in establishing a strong scholarly record.

List 2.5.2(a): Primary (Peer-Reviewed) Scholarly Activity

- Peer reviewed journal articles published online and/or in print,
- Peer-reviewed scholarly books published online and/or in print,
- Peer-reviewed chapters in edited volumes published online and/or in print,
- Articles in peer-reviewed conference proceedings published online and/or in print.
- Other creative works or other appropriate publications, including scholarly podcasting, film, or technical support research reports
- Publication of textbooks or other instructional materials as well as books, papers, and articles (including those in electronic format) written for a popular or non-academic audience.

List 2.5.2(b): Other Significant Scholarly Activity

Dissemination of scholarly work

- Journal articles, scholarly books, book chapters and contributions to conference proceedings that are in press, forthcoming, or under review.
- Peer-reviewed presentations at conferences, workshops, etc.,
- On-campus presentations,
- Invited or keynote presentations at conferences, workshops, seminars, etc.,
- Invited presentations at other universities,
- Shares expertise at public events or through various media forums,
- Other scholarly reports, such as government publications,
- Appropriate consulting work,

- Research grants,

Other scholarship activities

- Refereeing book manuscripts, journal articles, grant proposals, or competitions for scholarly awards and prizes given by external agencies,
- Recognition for excellence in scholarly activity,
- Editorship of a journal, book or other scholarly venue.

Mentorship

- Assists colleagues in development of scholarship practice,
- Supervises student research (as applicable).

2.5.3 Levels of Performance for Scholarship –Tripartite Positions

For attaining tenure and progressing through the ranks, there are ***increasing expectations*** for performance and contributions in research, scholarship and creative work. ***Incremental and accumulative growth*** must also be demonstrated. Clear and compelling evidence must be provided to allow the candidate's scholarly activity to be assessed in terms of ***quantity, quality, and impact***.

In evaluating the various levels of performance for scholarship, the weight attached to a particular contribution will be commensurate with the quality and sphere of influence of that contribution.

Scholarship Potential: A candidate for an initial appointment as an Assistant Professor must show potential for successful engagement in scholarly activity within the public realm.

Satisfactory Trajectory for Scholarship: Pre-tenure faculty members who were initially appointed as Assistant Professors must have established a satisfactory trajectory in scholarship for the purposes of the three-year review of their appointments. At a minimum, this means showing evidence that they are on track to achieve the performance level of "Satisfactory Scholarship" (as described below) by the time of their assessment for tenure. There must be initial evidence of meeting the Department's academic performance standards for scholarship, as well as clear potential for professional growth and the promise of future development in scholarship.

Satisfactory Scholarship: A tripartite candidate for tenure who was initially appointed as an Assistant Professor must have established a satisfactory record of scholarship that is ***recognized and assessed at a local/regional level***. There must be consistent evidence of meeting the Department's academic performance standards for scholarship, as well as demonstrated professional growth and the promise of future development in scholarship. Consequently, satisfactory performance in scholarship entails that the candidate shows clear progress toward becoming a mature and productive scholar.

Evidence of this progress involves a strong beginning indicated:

- by dissemination activities that are included in List 2.5.2(a). In particular, as a key part of establishing a local or regional sphere of influence, a tripartite candidate for tenure will have an on-going record of scholarship that normally ***includes a minimum of three peer-reviewed journal articles***, or their equivalent from list

2.5.2 (a), over five years.

- Other evidence includes other types of scholarly work as detailed in List 2.5.2(b) and should include evidence of all three categories including dissemination, other scholarship activities, and mentorship.

Superior Scholarship: The research, scholarly, creative or professional work of a candidate for Associate Professor must be ***recognized and assessed at a national level***. There must be evidence of consistent accomplishment in the discipline, demonstrated through substantive performance in scholarship, which ordinarily entails:

- by dissemination activities that are included in List 2.5.2(a). In particular, as a key part of establishing a national sphere of influence, a candidate for Associate Professor will have an on-going record of scholarship over the career to date that normally **includes a minimum of five peer-reviewed journal articles**, or the equivalent from list 2.5.2 (a)
- Other types of scholarly work applicable to List 2.5.2(b). Some examples of evidence of consistent accomplishment might include:
 - Supervision/co-supervision of graduate theses and/or dissertations,
 - Assisting/mentoring colleagues in scholarship activities,
 - Recognition for excellence in scholarly activity,
 - Editorship of a journal, book or other scholarly venue,
 - Sharing expertise at public events or through various media forums,
 - Invited or keynote presentations at national conferences, workshops, seminars, etc.

Outstanding Scholarship: The research, scholarly, creative or professional work of a candidate for Professor must be ***recognized and assessed at an international level***. There must be evidence of sustained success in the dissemination of Scholarly Activity, which ordinarily entails:

- sustained productivity in scholarly activity of high quality and significance as measured chiefly by publication through items listed in 2.5.2 (a). In particular, as a key part of establishing an international sphere of influence, a candidate for Professor will have an on-going record of scholarship over the career to date that normally **includes a minimum of 10 peer-reviewed journal articles**, or the equivalent from list 2.5.2 (a).
 - other types of scholarly work applicable to List 2.5.2(b); relevant examples of evidence of outstanding scholarship might include:
 - Supervision/co-supervision on internal/external student thesis and/or dissertation committees,
 - Contributes to scholarly development of colleagues beyond the university
 - Invited or keynote presentations at international conferences, workshops, seminars, etc.,
 - Influences the public through a variety of media forums
 - leadership in scholarly activities in the candidate's discipline at TRU and beyond.

2.6 Assessment of Service

Service involves both active participation in the collegial self-governance of and contributions to the University community at the Departmental, Divisional/School, and University levels and to the Member's discipline and/or profession. Service may also involve contributions to the community at large. Participation in University and Faculty Association committees, assistance and leadership in Department and Divisional administration, and contributions to the intellectual and cultural life of the campus constitutes part of such service. Service also includes contributions to professional or learned societies through participation in local, provincial, national, and international organizations and programs related to the faculty member's discipline; contributions in a professional capacity to the community at large; and to cultural, community and service organizations.

2.6.1 Service Dossiers – Bipartite and Tripartite Positions

While not specifically required in the *Collective Agreement*, the Department recommends that candidates for tenure and/or promotion include a service dossier. In addition to specific evidence pertaining to service, such a dossier should include a summary of the candidate's service record, its evolution, and its planned future directions.

2.6.2 Metrics for the Assessment of Service – Bipartite and Tripartite Positions

The following list – while not exhaustive – indicates service activities that can enter into the assessment in support of tenure and/or promotion.

List 2.6.2(a): Service Activities

- Meaningful participation in, contribution to, or leadership of the Department, which may include committees, special projects, or other initiatives,
- Meaningful participation in, contribution to, or leadership of Divisional, University and Faculty Association committees,
- Participation in, contribution to, or leadership in Departmental or Divisional administration,
- Contributions to the intellectual and cultural life of the campus,
- Contributions to professional or learned societies through participation in local, provincial, national, and international organizations and programs related to the faculty member's discipline,
- Contributions in a professional capacity to the community at large and to cultural, community, and service organizations, and
- Academic and professional mentorship.

In documenting their service contributions candidates must indicate their roles (e.g., member, chair, etc.) and extent and nature of their contributions. As faculty members move through the ranks, there is an expectation of increasing leadership and widening spheres of influence in keeping with a culture of service.

2.6.3 Levels of Performance for Service – Bipartite and Tripartite Positions

For attaining tenure and progressing through the ranks, there are **increasing expectations** for performance and contributions to service within the university, the discipline and/or profession and, where applicable, the extended community.

Incremental and accumulative growth must also be demonstrated. Clear and compelling evidence must be provided to allow the candidate's service activity to be assessed in terms of **quantity, quality, and impact**.

The service component of a tenure and promotion portfolio is expected to include an appropriate mix of contributions to the collegial self-governance of the university; discipline-related or professional contributions to regional, provincial, national, and international communities; and participation in provincial, national or international service groups, academic, professional, and volunteer organizations.

- Service Potential: Candidates for an initial appointment as Assistant Professor or Instructional Support I must show commitment to service to the University, discipline and/or profession, and, when applicable, the community at large.
- Satisfactory Trajectory for Service: A pre-tenure faculty member who was initially appointed as Assistant Professor or Instructional Support I must have established a satisfactory trajectory in service for the purposes of the three-year review of their appointment. While initial service assignments typically should not be onerous, the faculty member must be on track to achieve the performance level of "Satisfactory Service" by the time of their assessment for tenure. In addition to evidence of appropriate initial service, there must be potential for professional growth and the promise of future development in service.
- Satisfactory Service: A candidate for tenure who was initially appointed as an Assistant Professor or Instructional Support I must have established a satisfactory record of service that involves institutional, disciplinary, professional and/or community service. In addition to consistent evidence of such service, a candidate must demonstrate professional growth and the promise of future development in service. Academic, community, disciplinary and/or professional service is expected to include contributions at a local/regional/provincial level.
- Superior Service: A candidate for Associate Professor or Instructional Support II must provide evidence of a strong, consistent record of service to the University, discipline and/or profession, and, when applicable, to the community at large. In evaluating service, peers will consider the quantity and the quality of the candidate's activities, effort, leadership, and the value or importance of the service contributions. Academic, community, disciplinary and/or professional service is expected to include contributions at a national level.
- Outstanding Service: A candidate for Professor or Instructional Support III must provide evidence of an outstanding long-term record of service to the University, discipline and/or profession, and, when applicable, to the community at large. In

evaluating service, peers will consider the quantity and the quality of the candidate's activities, effort, leadership, and the value or importance of the service. Academic, community, disciplinary and/or professional service is expected to include contributions at an international level.

3. Specific Appointment Criteria

The criteria below are to be applied in the context of assessing candidates during the hiring process. An initial appointment, which arises when the successful candidate has not previously held a university position, will normally be at the level of Assistant Professor or Instructional Support I, while a subsequent appointment may be at higher rank. Where a successful candidate already holds a given rank at another University, criteria in the Collective Agreement relating to transferability of that rank to TRU may apply.

3.1 Tripartite Faculty

3.1.1 Appointment as an Assistant Professor

To be appointed as an Assistant Professor, a candidate must meet the Department's requirements for *Academic Qualifications* (as specified in Section 2.1); and provide evidence demonstrating:

- (a) *Professional Role Potential* (as defined in Section 2.4.3),
- (b) *Scholarship Potential* (as defined in Section 2.5.3), and
- (c) *Service Potential* (as defined in Section 2.6.3).

3.1.2 Appointment at Higher Ranks

For an appointment at the Associate Professor or Professor level, candidates must meet or exceed the requirements for promotion to that rank (as specified in Section 5.1).

3.2 Appointment Criteria for Bipartite Faculty

3.2.1 Appointment as an Instructional Support I

To be appointed as an Instructional Support I, a candidate must meet the Department's requirements for *Academic Qualifications* (as specified in Section 2.1); and provide evidence demonstrating:

- (a) *Professional Role Potential* (as defined in Section 2.4.3), and
- (b) *Service Potential* (as defined in Section 2.6.3).

3.2.2 Appointment at Higher Ranks

For an appointment at the Instruction Support II or Instructional Support III level candidates must meet or exceed the requirements for promotion to that rank (as specified in Section 5.2).

4. Specific Tenure Criteria

Tenure shall be granted when there is consistent evidence of meeting the required academic performance standards, demonstrated professional growth, and the promise of future development.

A successful candidate to TRU who currently holds tenure at another University may be eligible to request an appointment with tenure. In such cases, the criteria below are to be applied in the context of assessing the candidate during the hiring process.

4.1 Tripartite Faculty

4.1.1 Pre-Tenure Review when Initially Appointed as an Assistant Professor

For the three-year pre-tenure review, faculty members initially appointed as Assistant Professors must meet the requirements for *Academic Qualifications* that were in place in the Department at the time of their appointments, and show evidence indicating:

- (a) *Satisfactory Trajectory for Professional Role* (as defined in Section 2.4.3),
- (b) *Satisfactory Trajectory for Scholarship* (as defined in Section 2.5.3), and
- (c) *Satisfactory Trajectory for Service* (as defined in Section 2.6.3).

Through the cumulative impact of items (a)-(c), the faculty member must also be developing a local and regional sphere of influence.

4.1.2 Attaining Tenure when Initially Appointed as an Assistant Professor

To attain tenure, those candidates initially appointed as Assistant Professors must meet the requirements for *Academic Qualifications* that were in place in the Department at the time of their appointments, and provide evidence documenting:

- (a) *Satisfactory Professional Role* (as defined in Section 2.4.3),
- (b) *Satisfactory Scholarship* (as defined in Section 2.5.3), and
- (c) *Satisfactory Service* (as defined in Section 2.6.3).

Through the cumulative impact of items (a)-(c), the candidate must also have developed a local and regional sphere of influence.

4.1.3 Attaining Tenure when Initially Appointed at Higher Rank

In exceptional cases, a faculty member may have been granted an initial appointment with rank, but without tenure. To attain tenure in such a case, a faculty member who was initially appointed at the rank of Associate Professor or Professor must show consistent evidence of meeting the required standards for promotion to their rank (as specified in Section 5.1 below), as well as demonstrating professional growth and the promise of future development.

4.2 Bipartite Faculty

4.2.1 Pre-Tenure Review when Initially Appointed as an Instructional Support I

For the three-year pre-tenure review, faculty members initially appointed as Instructional Support I must meet the requirements for *Academic Qualifications* that were in place in the Department at the time of their appointments, and show evidence indicating:

- (a) *Satisfactory Trajectory for Professional Role* (as defined in Section 2.4.3), and
- (b) *Satisfactory Trajectory for Service* (as defined in Section 2.6.3).

Through the cumulative impact of items (a) and (b), the faculty member must also be developing a local and regional sphere of influence.

4.2.2 Attaining Tenure when Initially Appointed as an Instructional Support I

To attain tenure, those candidates initially appointed as Instructional Support I must meet the requirements for *Academic Qualifications* that were in place in the Department at the time of their appointments, and provide evidence documenting:

- (a) *Satisfactory Professional Role (as defined in Section 2.4.3),*
- (b) *Satisfactory Service (as defined in Section 2.6.3).*

Through the cumulative impact of items (a) and (b), the candidate must also have developed a local and regional sphere of influence.

When candidates have selected modified weights for the assessment of their professional role, and service within the limits allowed by the Department in Section 2.2, any quantitative and or qualitative requirements to achieve a satisfactory level of performance in each role, which are specified in Sections 2.4-2.6, will be subject to minor upward and downward modification in correspondence with the adjustments of the weights.

4.2.3 Attaining Tenure when Initially Appointed at Higher Rank

In exceptional cases, a faculty member may have been granted an initial appointment with rank, but without tenure. To attain tenure in such a case, a faculty member who was initially appointed at the rank of Instructional Support II or Instructional Support III must show consistent evidence of meeting the required standards for promotion to their rank (as specified in Section 5.2 below), as well as demonstrating professional growth and the promise of future development.

5. Specific Promotion Criteria

Promotion shall be based on accomplishments beyond those required for the granting of tenure. All promotions must demonstrate incremental and cumulative progress and be based on accomplishments beyond the faculty member's current rank.

5.1 Tripartite Positions

5.1.1. Promotion to Associate Professor

For promotion to the rank of Associate Professor, a candidate must meet the Department's requirements for *Academic Qualifications* (as specified in Section 2.1), and provide evidence demonstrating:

- (a) *Superior Professional Role (as defined in Section 2.4.3),*
- (b) *Superior Scholarship (as defined in Section 2.5.3), and*
- (c) *Superior Service (as defined in Section 2.6.3).*

Through the cumulative impact of items (a)-(c), the candidate must also have developed a national sphere of influence. Normally a candidate for Associate Professor will have completed at least five (5) years of successful performance at the rank of Assistant Professor.

When candidates have selected modified weights for the assessment of their teaching, scholarship and service within the limits allowed by the Department in Section 2.2, any quantitative and or qualitative requirements to achieve a superior level of performance in each role, which are specified in Sections 2.4-2.6, will be subject to minor upward and downward modification in correspondence with the adjustments of the weights.

5.1.2. Promotion to Professor

For promotion to the rank of Professor, a candidate must meet the Department's requirements for *Academic Qualifications* (as specified in Section 2.1), and provide evidence demonstrating:

- (a) *Outstanding Professional Role (as defined in Section 2.4.3)*,
- (b) *Outstanding Scholarship (as defined in Section 2.5.3)*, and
- (c) *Outstanding Service (as defined in Section 2.6.3)*.

Through the cumulative impact of items (a)-(c), the candidate must also have developed an international sphere of influence. Normally a candidate for Professor will have completed at least five (5) years of successful performance at the rank of Associate Professor.

When candidates have selected modified weights for the assessment of their professional role, scholarship and service within the limits allowed by the Department in Section 2.2, any quantitative and or qualitative requirements to achieve an outstanding level of performance in each role, which are specified in Sections 2.4-2.6, will be subject to minor upward and downward modification in correspondence with the adjustments of the weights.

5.2 Bipartite Positions

5.2.1 Promotion to Instructional Support II

For promotion to the rank of Instructional Support II, a candidate must meet the Department's requirements for *Academic Qualifications* (as specified in Section 2.1), and provide evidence demonstrating:

- (a) *Superior Professional Role (as defined in Section 2.4.3)*, and
- (b) *Superior Service (as defined in Section 2.6.3)*.

Through the cumulative impact of items (a) and (b), the candidate must also have developed a national sphere of influence. Normally a candidate for Instructional Support II will have completed at least five (5) years of successful performance at the rank of Instructional Support I.

5.2.1 Promotion to Instructional Support III

For promotion to the rank of Instructional Support III, a candidate must meet the Department's requirements for *Academic Qualifications* (as specified in Section 2.1); and provide evidence demonstrating:

- (a) *Outstanding Professional Role (as defined in Section 2.4.3)*, and
- (b) *Outstanding Service (as defined in Section 2.6.3)*.

Through the cumulative impact of items (a) and (b), the candidate must also have developed an international of sphere of influence. Normally a candidate for Instructional Support III will have completed at least five (5) years of successful performance at the rank of Instructional Support II.

6. Acknowledgements

We acknowledge that we adapted from the following in developing this standards document:

Department of Marketing and International Business. (June 8, 2020). “Department of Marketing and International Business, Thompson Rivers University, Department Standards for Promotion and Tenure.”

Faculty of Arts, Committee on Decolonization and Indigenization. (April, 2021). “Sample Language Promoting Equity, Diversity, Inclusion, Decolonization, and Indigenization in Tenure and Promotion Standards Documents.”

Faculty of Science. (2021) “Academic Standards for Promotion and Tenure in the Faculty of Science. (Draft)

Journalism, Communications and New Media. (June, 2020). Department of Journalism, Communications and New Media, Thompson Rivers University, Department Standards for Promotion and Tenure.” (Draft)

7. Appendices

7.1 Collective Agreement Articles Relevant to Tenure and Promotion⁷

Article 5 - Appointment of Faculty Members

- 5.1.1 Ranks - Tripartite appointments
- 5.1.2 Ranks - Bipartite appointments
- 5.2.1 Tenure-Track Appointment
- 5.2.2 Renewal of Tenure-Track Appointment
- 5.2.3.1 Tenured Appointment
- 5.2.3.2 Change in Status from Bipartite or Tripartite Appointment for a Tenured Member

Article 6 - Tenure and Promotion of Faculty Members

- 6.1 Preamble
- 6.2 Progression to Tenure
- 6.2.4 Initial Appointment with Tenure
- 6.3 Progression to Promotion in Rank
- 6.3.4 Initial Appointment with Rank
- 6.4 Application for Tenure and/or Promotion
- 6.5 Procedures of the Division, Faculty or School Tenure and Promotion Committee (DFSTPC)
- 6.6 Procedures of the University Tenure and Promotion Committee (UTPC)
- 6.7 Action Subsequent to Voting
- 6.8 Timeline for Tenure and Promotion Process
- 6.9 University Appeals Committee
- 6.9.2 When a Faculty Member May Appeal
- 6.9.3 Submitting an Appeal
- 6.9.4 Membership of the UAC
- 6.9.5 University Appeals Committee Procedures
- 6.9.5.4 Appeals – Hearing Required

⁷ The purpose of Section 6.1 is to provide an overview of the coverage of the *Collective Agreement Between Thompson Rivers University and the Thompson Rivers University Faculty Association* as it pertains to promotion and tenure. The structure that is reported is from the *Collective Agreement* for April 1, 2019 to March 31, 2022 and may change over time. The version of the Collective Agreement that is current provides the applicable structure and content at any point in time.

6.9.5.5 UTPC recommendation is upheld

6.9.5.6 Appeal is upheld

6.10 Annual Report of Decisions on Tenure and Promotion

6.11 Criteria for Rank, Tenure and Promotion

6.11.5 Definitions of Categories

6.11.5.1 Teaching

6.11.5.2 Professional Roles

6.11.5.3 Scholarship

6.11.5.4 Service

6.11.6 Granting of Tenure

6.11.7 Rank

6.11.7.1 Assistant Professor/Assistant Teaching Professor/Librarian I/Counsellor I/Instructional Support I

6.11.7.2 Associate Professor/Associate Teaching Professor/Librarian II/Counsellor II/Instructional Support II

6.11.7.3 Professor/Teaching Professor/Librarian III/Counsellor III/Instructional Support III Article 6 – Appendix 1⁸

Article 10 - Workload

10.2 Academic Duties and Responsibilities

⁸ The Appendix to Article 6 in the *Collective Agreement* covers professional role activities, dossiers, etc.

7.2 References

- Boyer, E L. (1990). *Scholarship reconsidered: Priorities of the professoriate*. The Carnegie Foundation for the Advancement of Teaching.
- Collective Agreement Between Thompson Rivers University and the Thompson Rivers University Faculty Association*, April 1, 2019 – March 31, 2022.
- Potter, M. K., & Kustra, E. D. H. (2011). “The relationship between scholarly teaching and SoTL: Models, distinctions, and clarifications.” *International Journal for the Scholarship of Teaching and Learning*, 5(1), 1-18.
<https://doi.org/10.20429/ijstl.2011.050123>
- Senate Committee on Promotion, Tenure and Faculty Standards of Thompson Rivers University, “Principles and Essential Features of Standards Documents”, October 2007 with an update from January 2018.
- University Committee on Promotion, Tenure and Faculty Standards of Thompson Rivers University. (2019) “Tenure and Promotion Standards Template.”