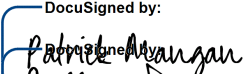
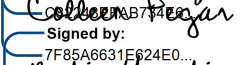
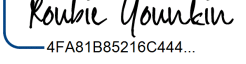
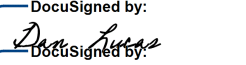
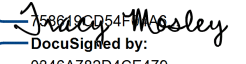
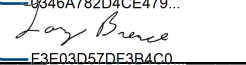
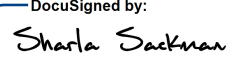
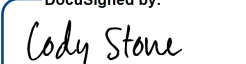
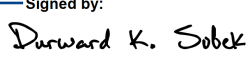





# Role, Scope, Criteria, Standards and Procedures of the **Extension Field Faculty**

Effective Date: July 1, 2025

APPROVALS	SIGNATURE	DATE
Patrick Mangan: Chair, Western Region Primary Review Committee	 DocuSigned by: Patrick Mangan	7/28/2025   10:07 PM MDT
Colleen Pegar: Chair, Central Region Primary Review Committee	 DocuSigned by: Colleen Pegar	7/29/2025   10:22 AM MDT
Roubie Yonkin: Chair, Eastern Region Primary Review Committee	 DocuSigned by: Roubie Yonkin	8/21/2025   5:42 AM MDT
Faculty	Chair, Primary Review Committee	
Dan Lucas, Western Region Department Head	 DocuSigned by: Dan Lucas	8/21/2025   6:30 AM MDT
Tracy Mosley, Central Region Department Head	 DocuSigned by: Tracy Mosley	8/21/2025   6:56 AM MDT
Larry Brence, Eastern Region Department Head	 DocuSigned by: Larry Brence	8/21/2025   8:13 AM MDT
Primary Administrative Reviewer	Department Head/Director	
Sharla Sackman	 DocuSigned by: Sharla Sackman	8/26/2025   8:19 AM MDT
Intermediate Review Committee	Chair, Intermediate Review Committee	
Cody Stone	 DocuSigned by: Cody Stone	8/29/2025   8:49 AM MDT
Intermediate Administrative Reviewer	Executive Director	
Durward Sobek	 Signed by: Durward K. Sobek	8/29/2025   11:30 AM MDT
University Retention, Tenure and Promotion	Chair, University RTP Committee	
Robert Mokwa	 DocuSigned by: Robert Mokwa	9/3/2025   8:28 AM MDT
Executive Vice President for Academic Affairs and Provost		

Role and Scope Document for  
the College of Extension  
Department of Extension Field Faculty

Table of Contents

TABLE OF CONTENTS ..... 1

ARTICLE I.     ROLE AND SCOPE OF THE UNIT ..... 2

ARTICLE II.    APPOINTMENT AND ADVANCEMENT OF RESEARCH FACULTY ..... 4

ARTICLE III.   ANNUAL REVIEWS ..... 4

ARTICLE IV.    PRIMARY REVIEW COMMITTEE AND ADMINISTRATOR ..... 5

ARTICLE V.     INTERMEDIATE REVIEW COMMITTEE AND ADMINISTRATOR..... 6

ARTICLE VI.    REVIEW MATERIALS ..... 6

ARTICLE VII.   APPLICABLE ROLE AND SCOPE DOCUMENTS ..... 8

ARTICLE VIII.  RETENTION REVIEW ..... 8

ARTICLE IX.    TENURE REVIEW ..... 9

ARTICLE X.     PROMOTION TO RANK OF ASSOCIATE PROFESSOR ..... 17

ARTICLE XI.    PROMOTION TO RANK OF PROFESSOR..... 17

ARTICLE XII.   PROCEDURES FOR UPDATE AND REVISION OF THE UNIT ROLE  
                  AND SCOPE DOCUMENT ..... 19

ARTICLE XIII.  APPROVAL PROCESS ..... 19

# Role and Scope Document for College of Extension Department of Extension Field Faculty

## **Article I. Role and Scope of the Unit**

Montana State University is served by Extension field faculty with a wide range of skills, areas of expertise, and responsibilities. Field faculty use a variety of tools and strategies to build and foster partnerships and assist diverse constituents, including performing a variety of administrative roles with local government officials, staff, offices, and volunteers; developing leadership with youth and adults; conflict management; and managing processes to achieve success.

### **Department**

Extension Field Faculty support the fulfillment of the Institution's mission. MSU Extension is divided into three regions: Western, Central, and Eastern which are considered Extension Departments for the purpose of retention, tenure, and promotion. This Role and Scope document applies to all three Extension Regions. Terminal degrees for tenure track faculty are at the master's level from an appropriately related field.

### **Teaching:**

Extension Field Faculty teaching is non-formal (i.e., does not lead to academic degrees). Extension Field Faculty develop and deliver educational programs that engage county and tribal communities across the state. Programming is determined by local needs through engagement with local elected officials, advisory groups, clientele, and/or volunteers. Programs may be one-time presentations, a series of instructional sessions, or long-term initiatives. Extension teaching includes:

- Delivering educational presentations and programs,
- Facilitating the delivery of information by experts (e.g., Extension specialists, industry professionals, etc.),
- One-on-one instruction through personal visits, email, phone and other contacts with constituents,
- Group instruction through workshops, classes and seminars,

### **Scholarship:**

Extension scholarship, as defined by the MSU Faculty Handbook, is the creation of partnerships, programs, and plans that leverage the knowledge and resources of the university and the public/private sector to:

- enhance learning, discovery, and engagement,
- educate and engage citizens,
- strengthen communities,

- address locally identified issues and problems,
- apply and disseminate knowledge, and
- contribute to the public good.

Scholarship in Extension includes planning, executing, and evaluating Extension programs; facilitating group processes within communities; creating a collaborative, inclusive environment; and guiding discussions to work toward solutions for identified issues. This may also include developing instructional materials, resources, and curriculum; participating in applied research; securing and administering grants; writing articles, publications, and research materials; and presenting at scholarly conferences.

#### **Service:**

Extension Field Faculty become involved in their respective communities through civic engagement and volunteer organizations. Service is the contribution of faculty knowledge and expertise to assist and engage individuals and/or organizations to meet goals and solve problems. Service activities generally fall into three categories:

- 1) professional service, which may include contributions to, or holding office in, a professional society, serving on or chairing committees, serving on an editorial board, and reviewing articles and publications;
- 2) public service, which entails providing the faculty member's professional expertise to and collaboration and engagement with, local, state, national, and global communities; and
- 3) university service, which includes service to faculty governance, serving on university, college, and department committees, and participation in other activities that contribute to the institution and its programs.

The types of public service activities that faculty members engage in reflect the nature of their appointments and their training and experience, as well as specific local needs.

### **Article II. Appointment and Advancement of Research Faculty**

Not applicable

### **Article III. Annual Reviews**

Each Regional Department Head (RDH) assigns an annual review rating to each faculty member in their respective departments. These proposed ratings are approved by the Director of Extension. Additionally, the Regional Department Heads meet to ensure consistency of ratings across Extension Field Faculty.

The College of Extension follows these procedures for conducting annual reviews:

- a) Annual reviews consist of the RDH's review of the faculty member's annual accomplishments relative to the faculty member's annual workload distribution. Evaluations are expected to recognize the requirements and expectations of the

- position and Field Faculty's efforts to meet local needs.
- b) Faculty Success (or any future MSU on-line database) is used for reporting by faculty. In addition, faculty can provide a summary of the teaching, scholarship, and service activities, particularly those items not captured well by Faculty Success, directly to the Department Head.
  - c) The supervisor discusses performance with faculty annually, rates the performance of each faculty member and submits an Annual Review form approved by the Extension Director and Provost using the performance rating system prescribed by the University.
  - d) The faculty member must sign the document on which the rating is communicated to the Extension Director. A faculty member's signature does not indicate concurrence with the rating; rather, it signifies that they have seen it. If the faculty member disagrees with the review, they have the prerogative to appeal to the Director of Extension (see Faculty Handbook Section 3 of Annual Review).

Copies of all annual reviews and the performance ratings of each faculty member shall be maintained in the faculty member's file in the department. These files shall be kept confidential and maintained in conformity with university requirements.

## **Article IV. Primary Review Committee and Administrator**

### **Section 4.01 Primary Review Committee – Composition and Appointment**

Each Regional Department Review Committee shall include **three (3) tenured** field faculty within the region. When possible, a minimum of two (2) committee members will be full professors. Two (2) faculty committee representatives will be nominated and elected by tenured and tenure track peers in their Region from tenured faculty not being considered for review. An at-large member will be appointed by the Regional Department Head to ensure diverse representation on the committee. Faculty representatives will serve staggered two-year terms. Field faculty may be elected to two consecutive terms.

In the event an emergent conflict of interest is identified, as per MSU Faculty Handbook policy, the Primary Review Administrator will obtain an alternate Extension reviewer, and if no eligible faculty member is available, obtain a reviewer from another MSU department.

### **Section 4.02 Primary Review Administrator**

The Regional Department Head (RDH) serves as the primary review administrator for Field Faculty in their respective regions.

### **Section 4.03 Identification of Responsible Entities**

The Regional Department Head will:

1. Establish the Primary Committee by facilitating the election of and appointing the members as described in Section 4.01.

2. Establish, select, and solicit internal and external peer reviews.
3. Assure that the following materials are included in the dossier:
  - a. Internal and external reviewer letters of solicitation, letters from the reviewers and, in the case of external reviewers, a short bio-sketch of the reviewer.
  - b. Applicable Role and Scope Document.
  - c. Letter of hire, any percentages of effort changes, all annual reviews, and all Evaluation Letters from prior retention, tenure, and promotion reviews at MSU.
  - d. Candidate's teaching evaluations from the review period. If the evaluations are not in electronic format, the unit will provide evaluation summaries. Upon request by review committees and review administrators, the unit will provide access to the original evaluations to review committees and administrators during the review.
  - e. Copies of all evaluation letters from review committees and review administrators.

## **Article V. Intermediate Review Committee and Administrator**

### **Section 5.01 Intermediate Review Committee – Composition and Appointment**

The Intermediate Review Committee is the Extension College Retention, Tenure, and Promotion committee, with composition and appointment as described in the College of Extension Role and Scope Document.

### **Section 5.02 Intermediate Review Administrator**

The Executive Director of Extension serves as the Intermediate Review Administrator.

### **Section 5.03 Level of Review following Intermediate Review Administrator**

The next level of review following the Intermediate Review Administrator is the University Retention, Tenure, and Promotion Committee (URTPC). The Extension Representative to URTPC will be nominated and elected from among the population of tenured Extension Field Faculty and will serve a three (3) year term.

## **Article VI. Review Materials**

### **Section 6.01 Materials Submitted by Candidate**

1. The "Cover Sheet" obtained from the Provost's office.
2. Comprehensive Curriculum Vitae with teaching, scholarship, and service activities of the candidate.
3. A personal statement that articulates how the candidate has met the standards and performance indicators in the areas of Teaching, Scholarship, Service, and Integration to demonstrate meeting the requirements for retention, tenure, or promotion, as applicable.

4. Separate self-evaluations for teaching, scholarship, service, and integration summarizing the evidence demonstrating that the candidate meets the standards for the attainment of retention, tenure, or promotion, as applicable.
5. Comprehensive list of educational programs taught and facilitated during the review period. Include program descriptions, course length, instructor evaluation data, program dates, and associated outcome/impact data defined as clientele knowledge gain, attitude change, behavior change, or adoption of best practices.
6. Comprehensive list of scholarly products, including curriculum and other educational materials, partnership development to leverage programming, refereed journal articles, articles in popular press, publications, participation in research projects, grants secured, media presentations, and websites.
7. Comprehensive list of service activities related to the university, community, and profession.  
Include the candidate's role in said activities.
8. Comprehensive list of professional development activities as they relate to the candidate's assigned role(s).

### **Section 6.02 Documentation of Collaborative Scholarly Contributions**

Extension faculty are expected to actively collaborate with peers and others. The candidate's role in and contribution to collaborative scholarly activities and products during the review period must be defined accurately.

*Example: Jane Doe, John Black, and Judy White collaborated to produce a noxious weed field tour. Doe and Black were primarily responsible for identifying resources and organizing the tour. White played a minor organizational role but served as the primary instructor. Doe designed and collected evaluation information.*

### **Section 6.03 Peer Review Solicitation Procedure**

Dossiers at all levels of review will include two internal peer reviews. Internal peer reviewers must be Extension field faculty or faculty from academic departments with Extension appointments. The candidate will submit a list of two (2) possible peer reviewers to the RDH; the RDH will select one (1) peer reviewer from the candidate's list, if possible, and will select one (1) other peer reviewer from eligible faculty.

Internal peer reviewers will review the entire dossier. They will be asked to provide a letter that includes their assessment of teaching, scholarship, service, and integration and an assessment of the candidate's performance relative to the appropriate standards and performance indicators for the corresponding level of review.

Dossiers for tenure and promotion review will include three (3) external peer reviews. External peer reviewers must be faculty members of a higher rank in other Extension systems. The Regional Department Head will select four (4) external peer reviewers.

External peer reviewers will be provided with the Extension Role and Scope Document and will review the entire dossier. They will be asked to provide a letter that includes their assessment of teaching, scholarship, service, and integration and an assessment of the candidate's performance relative to the appropriate standards and performance indicators for the corresponding level of review.

## **Article VII     Applicable Role and Scope Documents**

### **Section 7.01 Retention Review**

Candidates for retention are reviewed under the standards and indicators in the Role and Scope Documents in effect on the first day of employment in a tenurable position. Candidates may select a more recent Role and Scope document by notifying their Regional Department Head and indicating such on the dossier cover sheet.

### **Section 7.02 Tenure and Promotion to Associate Professor Review**

Candidates for tenure are reviewed under the standards and indicators in the Role and Scope Documents in effect on the first day of employment in a tenurable position. Candidates may select a more recent, approved Role and Scope document by notifying their Regional Department Head and indicating such on the dossier cover sheet.

### **Section 7.03 Promotion to Professor Review**

Candidates for promotion to the rank of Professor will be reviewed using standards and indicators in the Role and Scope documents in effect two (2) years prior to the deadline for notification of intent to apply for promotion. The candidate may select a more recent, approved Role and Scope document by notifying their Regional Department Head and indicating such on the dossier cover sheet.

## **Article VIII     Retention Review**

### **Section 8.01 Timing of Retention Review**

Faculty are reviewed for retention in the academic year specified in their Letter of Hire, unless extended under the Extending the Tenure Review Period Policy.

### **Section 8.02 University Standards**

The standards for the retention of probationary faculty members are:

- a) Effectiveness in teaching, scholarship, and service during the review period, and
- b) Integration of no less than two of the following during the review period: teaching, scholarship, and service, and
- c) Satisfactory progress towards meeting the standards for tenure by the candidate's tenure review year.

Candidates for retention are reviewed under the Role and Scope Documents in effect on the first day of employment in a tenurable position. Candidates may select a more recent,



approved Role and Scope document by notifying the primary review administrator.

### **Section 8.03 Performance Indicators**

The primary responsibilities of Extension faculty are teaching, scholarship, and service within the faculty member's discipline. Integration of teaching, scholarship, and service is integral to supporting the Extension mission. Section 9.03 of this document lists and describes performance indicators for teaching, scholarship, service, and integration. Unless otherwise noted, retention reviews use the same performance indicators that are used in tenure review.

### **Section 8.04 Quantitative and Qualitative Expectations**

The MSU Faculty Handbook defines Effectiveness as successful performance appropriate to years of service.

***Effectiveness in Teaching*** Candidates must provide evidence that it is reasonable to expect the candidate to achieve the standards for tenure at the time of tenure review as described in Section 9.04.

***Effectiveness in Scholarship*** It is expected that candidates meet the standard of effectiveness in scholarship by documenting scholarship efforts that identify local needs, develop curricula, present educational programs, and evaluate program outcomes during the review period. Additional scholarly products are described in Section 9.04. The record must be substantive enough for the candidate to achieve the standards for tenure at the time of tenure review.

***Effectiveness in Service*** Expectations for service are described in Section 9.04, except that there is not a requirement that service include assignment to a Department, College or University committee at MSU at the time of the retention review.

***Integration*** Candidates must demonstrate integration of no less than two of the following during the review period: teaching, scholarship, and service. Performance indicators and integration examples are listed in Section 9.03.

### **Section 8.05 Evidence of Performance Indicators**

Additional evidence of performance indicators is listed in Section 9.05. The same performance indicators and evidence that are used in the tenure review are used in the retention review.

### **Section 8.06 Status of Scholarly Products**

For retention review, scholarly products that are submitted, accepted, in press, or published at the time of review will be considered if they are included in the dossier and are appropriately documented.

## **Article IX. Tenure Review**

### **Section 9.01 Timing of Tenure Review**

Faculty are normally reviewed for tenure in the academic year specified in their Letter of

Hire, unless extended under the University's Extending the Tenure Review Period Policy. Faculty may initiate a tenure review earlier than designated in the letter of hire in exceptionally meritorious cases. Faculty seeking early tenure review must meet the same standards used in evaluating candidates who seek tenure after completion of the full tenure review period.

## **Section 9.02 University Standards**

The University standards for the award of tenure are:

- a) Sustained effectiveness in teaching and service;
- b) Sustained integration of no less than two of: teaching, scholarship, and service; and
- c) Accomplishment in scholarship

as demonstrated by the candidate's performance during the review period.

The review period for retention and tenure begins on the first day of employment in a tenurable position at the university and ends on the deadline established by the provost for submission of dossiers. Candidates may select a more recent, approved Role and Scope document by notifying the primary review administrator.

If a candidate is hired with credit for years of service at a prior institution, the tenure review period includes the time of prior service specified in the letter of hire.

## **Section 9.03 Performance Indicators**

The primary responsibilities of Extension faculty are teaching and scholarship. Service activity within the faculty member's discipline is secondary. Integration of teaching, scholarship, and service is integral to supporting the Extension mission.

### **Performance Indicators in Teaching**

*Sustained effectiveness* in teaching is consistent successful performance over time and offerings and different student populations as appropriate to the faculty member's appointment. Candidates for tenure meet the standard of sustained effectiveness in teaching by documenting educational efforts that are identified as a need and have significant value to participants.

The following is a list of performance indicators applicable to teaching. The indicators listed are considered examples of primary activities by which performance in teaching is evaluated.

- Group instruction through workshops, seminars, and classes that are based on identifiable needs.
- Individual instruction through personal visits, phone calls, and other contacts with constituents that address issues and needs directly related to health and wellness, economic well-being, agriculture, youth development, community vitality, etc.
- Fostering clientele learning through accessible educational programs or creating enhanced learning environments and opportunities.
- Developing and implementing teaching innovation and original programming, new

instructional methods, curriculum materials, or hybridized instruction/courses.

- Teaching collaborations with other faculty.
- Facilitating constituent groups and processes.
- Mentoring other field faculty or student interns.
- Summary of course evaluations.
- Awards or other honors related to teaching and programs developed.
- Peer review of educational materials.
- Delivery or facilitation of Extension programs and programs developed by others (e.g., Master Gardener, Pesticide Education, Master Food Preserver, Real Colors, Strong People, etc.).

This list is representative, but not exhaustive. As additional evidence of performance in teaching, the candidate may choose to include other relevant and appropriate indicators not listed here. The Department RTP Review Committee will determine the weight of such indicators and will describe this determination in their evaluation letter.

### **Performance Indicators in Scholarship**

*Accomplishment* is sustained and commendable performance reflected in the quantity, quality, and impact of scholarly activities and products. These activities and products include peer reviewed publications, formal peer-reviewed presentations, or comparable peer-evaluated works appropriate to the discipline. The activities and products must have impact and significance to the public, peers, or the discipline beyond the university.

Candidates for tenure meet the standard of accomplishment in scholarship by documenting scholarship efforts that identify local needs, develop curricula, present programs, and evaluate program outcomes. There are several scholarship responsibilities that are unique to the College of Extension.

Collaboration in program development is a highly valued component of scholarship in Extension. Examples may include cross-county or interdisciplinary program development with other Field Faculty, Extension Specialists, or community members/leaders/organizations. Candidates are expected to explain their contributions to collaborative scholarly efforts (see Section 6.02).

The following is a list of performance indicators applicable to scholarship. The indicators listed are considered examples of primary activities by which performance in scholarship is evaluated.

Indicators of scholarly activity:

- Formal or informal needs assessment through engagement with individuals, groups, and communities.
- Organization, development, management, and evaluation of Extension programs.

- Securing local, state, or national grant funding to leverage programs.
- Acquiring advanced knowledge to enhance Extension programming.
- Peer reviewed publications (e.g., MontGuides, fact sheets, *Lives & Landscapes* magazine articles, journal articles, articles, etc.)
- Participation in specialist research and resulting publications (e.g., MAES, MontGuides).
- Participation in applied, research-based programs or projects and resulting publications (e.g., MAES, MontGuides).
- Presenting at scholarly conferences at regional, state, and national levels.
- Generating creative products which enhance education, programs, delivery, and clientele learning.
- Assessing, communicating, and reporting impacts and outcomes.
- Awards or honors related to scholarly activity.
- Curriculum and instructional materials developed to achieve instructional goals.
- Partnership development with stakeholder groups.
- Non-refereed media such as newsletters, newspaper articles, radio programs, etc.

This list is representative, but not exhaustive. As additional evidence of performance in scholarship, the candidate may choose to include other relevant and appropriate indicators not listed here. The Department RTP Review Committee will determine the weight of such indicators and will describe this determination in their evaluation letter.

### **Performance Indicators in Service**

*Sustained effectiveness* in service is consistent successful performance over time and across a range of duties appropriate to the faculty member's appointment. Candidates for tenure meet the standards of sustained effectiveness in service by documenting evidence of consistent participation and service to local, regional, and statewide groups, and professional associations.

- Participation and leadership roles in community groups, boards, and committees.
- Participation and leadership roles in university, college, and department (regional) committees and groups.
- Participation and leadership (committee chair/officer) roles in professional organizations at state, regional, and/or national levels.
- Peer reviewing/editing articles or manuscripts (e.g., MontGuides, *Lives & Landscapes* magazine, other journals, fact sheets, etc.).
- Awards or honors related to service activity.

This list is representative but not exhaustive. As additional evidence of performance in service, the candidate may choose to include other relevant and appropriate indicators not listed here. Extension review committees and administrators will determine the weight of such indicators and will describe this determination in their evaluation letter.

### **Performance Indicators in Integration**

Candidates for tenure demonstrate integration by documenting integration of no less than

two of the following during the review period: teaching, scholarship and service.

The nature and extent of integrated activities will vary depending on the candidate's core disciplines. The following list offers examples of potential indicators of integration, with the understanding that integration can take many forms. The candidate must clearly define and describe how integration is achieved in the dossier.

- Examples of integration of scholarship and teaching:
  - Collaborating in research and/or publication with a specialist and extending results to the public
  - Extending or disseminating research through educational engagement with constituents
- Examples of integration of scholarship and service:
  - Providing research expertise through participation in groups, boards, or organizations
  - Identifying emergent community needs from the candidate's participation in and service to community groups/organizations
- Examples of integration of teaching and service:
  - Delivering professional development instruction through engagement with schools, organizations, constituents, Extension faculty or professional associations.
  - Providing relevant educational programs that meet needs identified through engagement with local organizations.

#### **Section 9.04 Quantitative and Qualitative Expectations Teaching Expectations**

The College of Extension expects faculty to 1) identify needs and develop and deliver relevant, high-quality educational programs, 2) contribute positively to the needs of constituents, and 3) mentor new Field Faculty and Extension Interns.

*Sustained effectiveness* in teaching is reported through program evaluations, which document the candidate's teaching performance and program quality, and serve as evidence to evaluate effectiveness. It is expected that educational efforts will be of higher quality and more focused on specific community needs at the tenure review.

Candidates will submit a minimum of five (5) RDH approved course instructor evaluations for each full year of employment and prorated appropriately for partial years. For example, Field Faculty who have been employed for 1 and ½ years will be expected to submit at least eight (8) evaluations. Only evaluation forms approved by the RDH will be accepted.

The College expectation is that the overall mean score from the student evaluation instruments not be less than the indicator for "Average." For example, 3.0 is the "average" evaluation score for "Overall Effectiveness" on an instrument with 5 categories (1=Poor, 2=Below Average, 3=Average, 4=Above Average, and 5=Excellent). Scores will be interpreted in the context of average scores relative to class size. It is expected that any overall mean score below "Average"

will be addressed by the candidate. Similarly, any issues related to teaching noted in the retention review should be addressed prior to tenure review.

### **Scholarship Expectations**

Extension Scholarship is the original intellectual work of faculty, defined by the MSU Faculty Handbook as the creation of partnerships, programs, and plans through Extension, or other community-based research, that leverages the knowledge and resources of the university and the public/private sector to enhance learning, discovery, and engagement; educate and engage citizens; strengthen communities; address locally identified issues and problems; apply and disseminate knowledge; and contribute to the public good. Other examples of scholarly work Extension faculty engage in may include participating in applied research projects; securing and administering grants; writing articles, publications, and research materials; and presentations at scholarly conferences.

*Accomplishment in scholarship* is judged by the quantity, quality, and impact of scholarly products and activities listed in the performance indicators in Section 9.03. The Primary Review Committee will assess accomplishment based on their own expertise. Examples of accomplishment include, but are not limited to, documentation of needs assessment; increased levels of outreach, educational programming, and partnership development; documentation of short- and/or medium-term program impacts; and increased community engagement and participation of the constituents served.

It is expected that scholarship be of high quality, be ongoing throughout the tenure review period, be commensurate with the associated discipline, and result in a substantive record of products and activities at the time of tenure. Publications are encouraged, but only products that are accepted or published at the time of review will be considered. A record of seeking internal or external funds to support scholarly activities is encouraged. At the time of tenure, it is expected that multiple items listed in Section 9.03 will appear in the candidate's body of work. Additional weight is placed on documentation of short- and/or medium-term program impacts. Due to the diverse nature of scholarship within the College of Extension, expectations will vary across disciplines.

Collaborative work is highly valued in Extension, and Field Faculty are encouraged to work with peers and Specialists to publish and/or give presentations at regional, state, or national conferences. There is no expectation that single-authored publications are required to demonstrate effectiveness in scholarship. Standards for determining author order vary within and across groups, so no inferences about level of contribution should be made based on author order. The candidate is expected to identify the level of individual contribution to grants and scholarly works (see Section 6.02).

### **Service Expectations**

*Sustained effectiveness* in service will be achieved if the candidate demonstrates active participation and competent execution of tasks in the areas of service described by the performance indicators in Section 9.03. Service is expected to include assignments on

department, college, or University committees and with local and professional organizations, especially when such participation raises the stature and reputation of the College of Extension or University.

### **Integration Expectations**

*Integration*, as defined by the MSU Faculty Handbook, is the creation of synergistic relationships among the teaching, scholarship, and service contributions of faculty, such as bringing new discoveries into the classroom, fostering student learning in the lab, field, and studio, engaging the wider community with scholarly products or innovations in teaching, or fostering engagement to address community needs.

It is expected that candidates demonstrate integration of no less than two of the following during the review period, teaching, scholarship, and service, to improve Extension programming and document medium- and/or long-term impacts of integration efforts. Performance indicators and integration examples are listed in Section 9.03.

### **Section 9.05 Evidence of Performance Indicators**

Applicable performance indicators, and evidence supporting the candidate's performance for each indicator, will be assessed using the contents of the candidate's dossier.

In addition to the listed evidence of performance indicators, properly documented nominations for and receptions of competitive awards for scholarship, teaching, or service will be considered as evidence of peer recognition.

### **Evidence of Performance Indicators in Teaching**

The list of evidence presented in Table 1 (pg. 15) is not exhaustive and may include items not listed in the table. Other evidence supplied by the candidate related to performance indicators for teaching will be considered in the review.

**Table 1. Performance Indicators in Teaching and Typical Evidence**

<b>Performance Indicators</b>	<b>Typical Evidence</b>
Courses taught and facilitated	List of courses taught or facilitated during the review period with a brief description, number of attendees, evaluation score (if applicable) and outcomes.
Course evaluations	Using the approved MSU Extension evaluation for courses taught and other evaluations to determine knowledge gained, adoption of practices, and other short-, medium- or long-term impacts.
Development and implementation of new pedagogical methods.	New teaching methods with evidence of supporting innovation. Brief description of the teaching methods, implementation process, audience, and outcome.
Addressing community needs	Meet the needs of constituents through group or individual instruction.
Mentoring of new Field Faculty or Extension Interns	Includes informal mentoring and formal mentoring through the MSU Extension Mentoring and Internship programs; brief description including Field Faculty or intern name, core discipline, actions taken and progress to date.
Training and mentoring volunteers	Includes training and leadership development of volunteer groups to advance programming (brief description of nature of volunteer work, educational activities, programs, and impacts).
Awards received for teaching	Name, date, and type of award (Department, College, University, professional organization).

**Evidence of Performance Indicators in Scholarship**

The list of evidence in Table 2 (pg. 16) is not exhaustive and may include items not listed in the table. Other evidence supplied by the candidate related to the scholarship performance indicators will be considered in the review. Only scholarly products that have been accepted, in-press, or published at the time of review will be considered.



**Table 2. Performance Indicators in Scholarship and Typical Evidence**

<b>Performance Indicators</b>	<b>Typical Evidence</b>
Assessing community needs	Summary of formal and informal strategies used to identify existing and emergent community needs.
Peer reviewed publications	Comprehensive list of articles, Extension publications. (e.g. MontGuides, <i>Lives &amp; Landscapes</i> magazine), fact sheets, journals, and other media contributions where the agent has used those opportunities to impart knowledge to others. Include title, year published, publisher, and associated website link.
Demonstrated engagement	Summary of community engagement, including with community members, boards, committees, and volunteers and how engagement has been leveraged to inform programming.
Internal or external funding	Brief description of the grant, funding source, or sponsorship, including title, funding agency, collaborators, activities, etc.), amount, and impacts of additional funding.
Partnerships or Collaborations	Description of partnerships/collaborations with Extension Specialists, Agriculture Experiment stations, peer faculty, professionals, and community stakeholder groups, etc. List partner(s)/collaborator(s), nature of engagement, individual roles, purpose, and resulting outcomes.
Program planning and evaluation	Brief description of each program or event series, the program development process, and the impacts and outcomes from the evaluations.
Development, modification of, and implementation of curriculum materials.	Workshop handouts and materials with evidence of supporting innovation. Brief description of the implementation process, audience, and outcome. May include a peer review of educational materials to evaluate effectiveness.
Papers or presentations given at professional meetings	Presentation title, co-presenters, organization, location and date. Describe products such as publications, presentations, poster sessions at local, state or national meetings, etc.
Development and publication of scholarly products	Conference presentations, educational curriculum, handouts, MontGuides, etc. Provide a brief description, overview of content and format, intended use and target audience, and where it is publicly available, if applicable. Include title, year published, publisher, and associated website link, as available.
Non-refereed media	Writing and delivering educational information through newsletters, local newspapers, radio, trade magazines, website contributions, social media

### **Evidence of Performance Indicators in Service**

The list of evidence in Table 3 is not exhaustive and may include items not listed in the table. Other evidence supplied by the candidate related to performance indicators for service will be considered in the review.

**Table 3. Performance Indicators in Service and Typical Evidence**

<b>Performance Indicators</b>	<b>Typical Evidence</b>
Membership and offices held on Department, College and University committees	Name and scope of the committee and dates of service.
Professional service and/or leadership on local, regional, Extension, state, national, or international organizations related to core disciplines in Extension	Name and scope of each organization, offices or other roles held, dates of service, and notable accomplishments.
Peer reviewing or editing publications	Citations including the title, publication, etc.; editorial role(s); and dates of service.
Service to community providing membership, leadership, or scholarship to local committees, organizations, and boards	Description of committee, organization, board, etc., service provided and role, audience, and outcomes.

**Table 4. Performance Indicators in Integration and Typical Evidence**

<b>Performance Indicators</b>	<b>Typical Evidence</b>
Integration of at least two areas across teaching, scholarship, and service	Narrative describing examples of sustained integration. Performance indicators and integration examples are listed in Section 9.03.

### **Section 9.06 Status of Scholarly Products**

For tenure review, only scholarly products that are accepted, in press, or published at the time of review will be considered, if they are included in the dossier and are appropriately documented.

## **Article X Promotion to Rank of Associate Professor**

### **Section 10.1 University Standards**

The University standards for promotion to the rank of Associate Professor are the standards for the award of tenure. Appointment at the rank of Associate Professor or Professor does not demonstrate, in and of itself, that standards for tenure have been met.

## **Article XI Promotion to Rank of Professor**

The rank of Professor represents the highest academic achievement and should be reserved for individuals who are demonstrably outstanding among their peers in the discipline. Candidates for promotion to Professor are expected to maintain a significant and continuing record of

professional achievement. A candidate for Professor is expected to have achieved distinction above that of an Associate Professor.

### **Section 11.01 Timing of Review**

Normally, faculty are reviewed for promotion after the completion of five (5) years of service at the rank of Associate Professor; however, faculty may seek promotion earlier if they can establish that they meet the same standards of effectiveness and excellence used in evaluating candidates after five (5) years in rank.

### **Section 11.02 University Standards**

The University standards for promotion to the rank of Professor are:

- a) Sustained effectiveness in teaching and service;
- b) Sustained integration of no less than two of teaching, scholarship, and service; and
- c) Excellence in scholarship

as demonstrated by the candidate's performance during the review period. The review period for promotion to professor is the period of employment at MSU in the rank of Associate Professor plus the time that the candidate's MSU tenure dossier was under review until the deadline established by the provost for submission of the dossier for promotion to professor.

Faculty members seeking promotion to Professor must notify the primary review administrator of their intent by the deadline established by the provost. Only tenured Associate Professors may be promoted to the rank of Professor. Unsuccessful candidates may reapply.

*Excellence* is defined by the University Faculty Handbook as sustained, commendable, and distinguished performance reflected in the quantity, quality, and impact of scholarly activities and products. These activities and products include peer-reviewed publications, formal peer-reviewed presentations, or comparable peer-evaluated works appropriate to the discipline. The activities and products must have a notable impact and significance to the public, peers, or the discipline beyond the university.

### **Section 11.03 Performance Indicators**

The performance indicators and weighting used for this review are the same as those defined in Section 9.03 of this document, with the following three (3) exceptions. In teaching expectations, additional weight is placed on formal or informal mentoring of other Field Faculty or hosting and mentoring student interns. In scholarship, additional weight is placed on documenting medium- and/or long-term program impacts. In service expectations, an additional weight is placed on significant contributions to regional, College, and University committees and professional associations, committees, and programs.

### **Section 11.04 Quantitative and Qualitative Expectations**

In all areas teaching, scholarship, and service, candidates for Full Professor are expected to have substantial, positive impacts and outcomes for Extension clientele and receive recognition from peers.

Expectations for promotion to the rank of Professor include all the expectations for tenure and promotion to Associate Professor (see Section 9.04), with certain additional expectations as detailed below. The evidence for teaching and service performance indicators for the review period for promotion to Professor should again demonstrate *sustained effectiveness* over the review period. The candidate should show evidence of *sustained integration* and *excellence* in scholarship over the review period.

An additional indicator for promotion to Professor includes documenting medium- and/or long-term impacts in major program areas through program development, partnerships, and collaborations leading to fulfilling the Extension mission to ***improve the lives of Montana citizens by providing unbiased research-based education and information that integrates learning, discovery, and engagement to strengthen the social, economic and environmental well-being of individuals, families, and communities.***

### **Teaching Expectations**

Candidates for full professor demonstrate meeting the standard of sustained effectiveness in teaching by documenting educational efforts that are identified as having significant value to participants. See sections 9.04 and 11.03 for additional information.

In addition, it is expected that educational efforts will be characterized by exceptional clientele satisfaction and substantial recognition by peers or professional associations in the candidate's discipline.

### **Scholarship Expectations**

The standard for scholarship for Professor changes from accomplishment to *excellence*. The candidate is expected to demonstrate that they have contributed in a significant manner to their discipline. Candidates for Professor demonstrate meeting the standards of excellence in scholarship by documenting scholarship efforts that identify local needs, lead to effective program development and management, and effectively evaluate program outcomes. See Section 9.04 and 11.03 for additional information.

*Excellence* includes, but is not limited to, receiving state, national or international recognition from peers and colleagues as having made important scholarly contributions to the candidate's discipline. The College expects that scholarly results will be disseminated through publications and presentations. Receiving internal or external grant funding is also considered a potential indicator of excellence.

### **Service Expectations**

Candidates for full professor demonstrate meeting the standards of *sustained effectiveness* in service by documenting evidence of consistent participation and service to local, regional, state groups, to College, University and professional committees in leadership roles. Refer to Section 9.04 and 11.03 for additional information.

### **Integration Expectations**

Candidates for full professor demonstrate they meet the standard for Professor by documenting sustained integration of no less than two of the following during the review period: teaching, scholarship, and service. Candidates will show clear connections between their work in two of these areas (see Section 9.04) and document medium- and/or long-term impacts of integration efforts.

#### **Section 11.05 Evidence of Performance Indicators**

Applicable performance indicators, and evidence supporting the candidate's performance for each indicator, will be assessed using the contents of the candidate's dossier. The description of evidence of performance indicators is found in Section 9.05 of this document.

#### **Section 11.06 Status of Scholarly Products**

For promotion to full professor, only scholarly products that are published at the time of review will be considered, if they are included in the dossier and are appropriately documented.

### **Article XII Procedures for Update and Revision of the Unit Role and Scope Document**

Review committees, both primary and secondary, will review the Role and Scope Document at least every three years. Should any committee recommend changes, the review administrator will convene a committee of a representative from each primary review committee, the secondary committee and college representative to the URTPC to consider proposed changes and make recommendations.

Approval of changes will follow the procedures outlined in the Faculty Handbook. The review committee will act on any proposed changes received from the URTPC Chair on an annual basis and will undertake a full review of their Document no less than every five (5) years.

### **Article XIII Approval Process**

#### **Section 13.01 Primary Academic Unit Role and Scope Document**

- a) the tenurable faculty and administrator(s) of the primary unit,
- b) the Extension Retention, Tenure, and Promotion committee and Executive Director of Extension,
- c) the University, Retention, Tenure and Promotion Committee (URTPC), and
- d) the provost.

#### **Section 13.02 Intermediate Academic Unit Role and Scope Document**

- a) the promotion and tenure review committee and administrator of the intermediate unit,
- b) the University Retention Tenure and Promotion Committee (URTPC),
- c) the provost.