

**Department of Accounting and Finance Bylaws
College of Business – The University of West Florida**

Table of Contents

Preamble.....	2
I. Department Faculty Meetings.....	2
II. Policies and Procedures for Annual Evaluation, Promotion, Tenure, and Post-Tenure Review.....	3
III. Mentor Program for Tenure-Track Faculty.....	3
Mentoring Policy.....	3
Responsibility of the Mentor.....	4
Responsibility of the Mentee.....	4
IV. Midpoint Review for Tenure-Track Faculty.....	4
Purpose of the Midpoint Review.....	4
Timing of Midpoint Review.....	4
Membership of the Midpoint Review Committee.....	4
Materials for Midpoint Review Committee.....	5
Responsibilities of the Midpoint Review Committee.....	5
V. Teaching Schedules.....	5
VI. Assignment of Supplemental Teaching Appointments.....	5
VII. Office Space.....	6
VIII. Bylaws Severability.....	6
IX. Relationship of Department Bylaws to the Collective Bargaining Agreement.....	6
Appendix 1. Policies and Procedures for Annual Evaluation.....	7
Categories of Performance.....	7
Evaluation Standards for Teaching.....	7
Evaluation Standards for Service.....	9
Evaluation Standards for Scholarly and Creative Activity.....	10
Weighting of Performance Categories.....	16
Overall Annual Evaluation Ratings.....	16
Appendix 2: Policies and Procedures for Promotion.....	18
Overview of Evaluation for Promotion.....	18
University Criteria for Promotion Decisions.....	18
College Criteria for Promotion Decisions.....	18
Department Criteria for Promotion Decisions.....	19
Appendix 3: Policies and Procedures for Tenure.....	21
Overview of Evaluation for Tenure.....	21
University Criteria for Tenure Decisions.....	21
College Criteria for Tenure Decisions.....	21
Department Criteria for Tenure Decisions.....	22
Appendix 4: Policies and Procedures for Post-Tenure Review.....	24

Adopted: April 11, 2024

Preamble

The Department of Accounting and Finance (hereafter “the Department”) endorses the Mission statements of the University and the College of Business (hereafter “the College”). Issues not covered in these Bylaws will be governed by the Bylaws of the College.

I. Department Faculty Meetings

The Chair, or a designee of the Chair, shall preside over all meetings of the Department.

Department meetings shall be conducted as follows:

- a. The Department shall meet at least once each fall and spring semester to execute and discharge the business that needs to be transacted. The Chair may call additional meetings as he or she determines necessary. Except as noted in subsection I(c) all meetings are to be called with at least five working days’ notice. No such notice is required if the purpose of the meeting is information sharing only. Most meeting activities can be accomplished in an informal manner. However, when the Chair determines necessary, or when requested by any voting member, *Robert’s Rules of Order* will prevail.
- b. A member of the Department office staff, or designee thereof, shall be responsible for the taking of the minutes, keeping a permanent record of Department faculty meetings, and for keeping and distributing the minutes as required by these Bylaws. The minutes are to be distributed to the members of the faculty within ten working days of the meeting for which the minutes were taken.
- c. The Chair shall convene special meetings of the Department faculty upon petition of at least 25% of the voting faculty as defined in I(d) or when deemed necessary by the Business College Council or the Dean.
- d. Voting members include full-time tenure-track faculty, full-time tenured faculty, faculty on phased retirement, full-time instructors, and full-time non-tenure track faculty. The definition of voting members excludes individuals with visiting appointments, adjuncts, and non-teaching advisors. The Department Chair is a voting member, but only casts a vote to break a tie. This definition of voting members applies throughout these Bylaws except for matters described in subsection I(h).
- e. For all matters except those described in I(h), a quorum (the number of persons needed to conduct business at a meeting) is defined as 75% of the members, as defined in I(d).
- f. For all matters except those described in I(g) and I(h), passage of a motion requires a simple majority of voting members, as defined in I(d), who are present at the meeting when the motion is made.
- g. Except as described in subsection I(h), changes to these Bylaws require an affirmative vote of 66.67% of the members defined in I(d).
- h. For changes to the standards for promotion, tenure, and post-tenure review (as indicated in Part II of these Bylaws, including appendices 2-4), voting members include the Department Chair, full-time tenure track faculty, full-time tenured faculty, and phase retirement faculty. For said changes, a quorum is defined as 75% of those same faculty listed here in this subsection I(h). For said changes, passage of a motion requires

an affirmative vote of 66.67% of those same faculty described here in this subsection I(h).

- i. The Department may at times conduct regular Department business by e-mail. If department meetings are held by e-mail, all members should be included. For all matters except those described in I(h), a member is defined in subsection 1(d). For matters described in subsection I(h), a member is defined in subsection I(h). If motions are made, there should be adequate opportunity for discussion by e-mail. If motions are voted on, the “members present” is presumed to include all members as defined in either I(d) or I(h), as applicable.
- j. Handwritten or e-mail proxies should be submitted to the Chair prior to or at the beginning of the meeting. The proxy must identify the member giving the proxy and the member who will vote the proxy. The proxy should be signed (if handwritten) or include a signature line (if e-mail). Such proxies are valid for counting a quorum and for voting on specified items from the prepared agenda.
- k. The Chair shall prepare and distribute an agenda for the meeting at least 48 hours prior to the start of the meeting. Any items that the faculty desire to have included on the agenda should be communicated to the Chair prior to the meeting.
- l. No less than 48 hours prior to a meeting in which a major motion will be introduced, all voting members should receive a copy of the proposed motion. Major motions may include proposals for changes to these Bylaws, changes to curriculum, changes to personnel policies, or similar matters.

II. Policies and Procedures for Annual Evaluation, Promotion, Tenure, and Post-Tenure Review

The Department will adopt and maintain policies and procedures for annual evaluation, promotion, tenure, and post-tenure review that are consistent with the UWF-UFF Collective Bargaining Agreement (CBA) and with the University’s and the College’s annual evaluation, promotion, tenure, and post-tenure review policies and procedures. To the extent that the College, the CBA, and/or the University state specific policies and procedures for annual evaluation, promotion, tenure, and post-tenure review, the Department adopts those policies and procedures as the minimum requirements for the Department and its members.

The Department’s Policies and Procedures for Annual Evaluation are incorporated herein as Appendix 1. The Department’s Policies and Procedures for Promotion are incorporated herein as Appendix 2. The Department’s Policies and Procedures for Tenure are incorporated herein as Appendix 3. The Department’s Policies and Procedures for Post-Tenure Review are incorporated herein as Appendix 4.

III. Mentor Program for Tenure-Track Faculty

Mentoring Policy

The Department Chair shall assign a mentor for each new faculty hire as soon as possible. The mentor should serve as an informal guide for the new faculty member beginning upon their arrival on campus and continuing past their midpoint review. The mentor should help the new

faculty member become familiar with the University culture and become aware of University resources. The mentor should serve as a “safe” person who is available to help the new faculty member with questions or problems without fear of impacting tenure and/or promotion decisions. Ideally, the mentor will help contribute to new faculty morale, motivation, and a sense of community.

Responsibility of the Mentor

The mentor should contact the new faculty member in advance of his/her arrival at the University and then meet with the new faculty member on a regular basis through at least the midpoint review period. The mentor should provide informal advice to the new faculty member on aspects of teaching, scholarly and creative activities, and committee work or be able to direct the new faculty member to other appropriate individuals. The mentor should treat all interactions and discussions in confidence. There is no evaluation or assessment of the new faculty member on the part of the mentor, only supportive guidance and constructive feedback.

Responsibility of the Mentee

The new faculty member should keep his/her mentor informed of any problems or concerns as they arise. If the mentoring relationship is not working out, the faculty member should contact the Department Chair to request a different mentor. The Chair shall have discretion as to whether to replace the mentor.

IV. Midpoint Review for Tenure-Track Faculty

Purpose of the Midpoint Review

The purpose of the Midpoint Review is to provide support and guidance in the areas of teaching, scholarly and creative activities, and service for tenure-track faculty in a timely fashion for faculty to continue or modify progress for a successful candidacy.

Timing of Midpoint Review

The Midpoint Review for candidates on a standard six-year tenure clock will occur in the spring of the third year. Candidates should submit a completed portfolio by 1 March. The Department Chair will determine the appropriate spring term for candidates arriving with time towards tenure and promotion credit.

Membership of the Midpoint Review Committee

In accordance with the University Tenure and Promotion Guidelines the Chair may appoint a Midpoint Review Committee in lieu of the Chair providing the midpoint review. The committee should include at least three faculty members including two tenured faculty who ideally have experience in either the College of Business or University Personnel Committee, and the new faculty member’s mentor. The Department Chair constitutes the Committee from the above pool of accounting and finance faculty. The Department Chair will not serve on the Committee.

Materials for Midpoint Review Committee

The midpoint review will not be as extensive as the formal tenure review that occurs toward the end of the probation period. The documents for the Midpoint Review should include a current vita, annual evaluations, student evaluations of teaching, peer evaluation of teaching (if applicable), selected examples of teaching materials and scholarship, and a self-evaluation by the faculty member.

Responsibilities of the Midpoint Review Committee

The Committee will evaluate the candidate using the current Departmental standards for tenure. If deficiencies exist, the Committee will provide specific recommendations for a successful tenure and promotion. If the Committee affirms the candidate's progress, the committee will provide specific rationale of affirmation. The committee will provide a formal letter of the candidate's progress to the candidate, the Department Chair, and the COB Dean. The Dean will review the Department's written midpoint review and respond to the Department and the faculty member in writing. Further use of these materials is at the discretion of the faculty member. The Midpoint Review Committee should assist the tenure candidate by providing advice and recommendations for producing an effective tenure application portfolio.

V. Teaching Schedules

To enhance the faculty scholarly and creative activity, the Department will attempt to give every member of the faculty a teaching schedule that is either two days per week (MW or TR) or three consecutive (MTW or TWR) days per week. Additionally, the Chair will try to accommodate scheduling requests where possible.

VI. Assignment of Supplemental Teaching Appointments

The Department should offer courses that meet the needs of students, the Department, the College of Business (COB), and the University. Available supplemental teaching appointments (e.g., summer courses, overload courses) will be offered equitably as appropriate to qualified faculty, not later than five (5) weeks prior to the beginning of the appointment, if practicable. Supplemental teaching appointments are assigned using the following criteria.

1. Courses should be assigned to faculty members with appropriate content expertise and qualifications.
 - a. Whenever possible, courses will be assigned to qualified, in-unit faculty, rather than to adjuncts.
 - b. If a faculty member has lost AACSB academic status (i.e., Scholarly Academic, Practice Academic, Scholarly Practitioner, or Instructional Practitioner), the faculty member generally will not be eligible for supplemental teaching appointments.
2. The Department Chair will attempt to give at least one summer supplemental teaching appointment to all eligible faculty who request to teach during the summer.
 - a. All supplemental teaching appointments will be based on appropriate content expertise and qualifications as well as faculty seniority.

- b. If all faculty members are not able to teach at least one supplemental teaching appointment during the summer (i.e., because of low student demand, funding limitations, etc.), faculty will rotate teaching courses each summer. For example, faculty A would teach in year 1, and faculty B would teach in year 2.
- c. If a faculty member is offered a supplemental teaching appointment during the summer, but chooses not to teach during the summer, that faculty member would rotate as if they had accepted the supplemental teaching appointment. In other words, a faculty member cannot “store up” teaching assignments for a later date.
- d. Subject to the availability of courses in faculty members’ areas of expertise, if all faculty members in the Department have been given an opportunity to teach one supplemental teaching appointment during the summer, faculty may be offered one or more additional supplemental teaching appointments during the summer if there is sufficient demand, funding, etc. If there is not enough demand or funding to offer two classes to all faculty wishing to teach two classes, then the Department will follow a second course assignment rotation consistent with the first-course assignment rotation outlined above.

VII. Office Space

Available office space will be allocated based first upon faculty rank, and second upon longevity, where longevity is defined as time in rank at UWF. The following faculty rank ordering will be used: professor, associate professor, assistant professor, instructor, visiting, emeriti, adjunct. For example, a professor with 10 years longevity has priority over all associate professors with 15 years; and a professor with 25 years longevity has priority over all professors with less than 25 years longevity. In addition, a professor with 5 years in rank while at UWF has priority over a professor just hired from outside UWF, regardless of how long they have been in rank.

VIII. Bylaws Severability

The provisions of these Bylaws are severable, and if any provision shall be held invalid or unenforceable, that invalidity or unenforceability shall attach only to that provision and shall not in any manner affect or render invalid or unenforceable any other provision of these Bylaws, and these Bylaws shall be carried out as if the invalid or unenforceable provision were not contained herein.

IX. Relationship of Department Bylaws to the Collective Bargaining Agreement

In instances where the CBA authorizes departments/units to define and/or clarify terms and conditions of employment related specifically to the Department, these Bylaws constitute the sole and exclusive document wherein those department-specific terms and conditions reside.

Appendix 1. Policies and Procedures for Annual Evaluation

Categories of Performance

The Department uses the following performance categories and definitions (as taken from the Florida Board of Governors' Regulation 10.003) in its annual evaluation processes:

- Exceeds Expectations: a clear and significant level of accomplishment beyond the average performance of faculty across the faculty member's discipline and unit
- Meets Expectations: expected level of accomplishment compared to faculty across the faculty member's discipline and unit
- Does not Meet Expectations: performance falls below the normal range of annual variation in performance compared to faculty across the faculty member's discipline and unit but is capable of improvement
- Unsatisfactory: failure to meet expectations that reflect disregard or failure to follow previous advice or other efforts to provide correction or assistance, or performance involves incompetence or misconduct as defined in applicable University regulations and policies

Evaluation Standards for Teaching

Overview of Teaching Evaluation

The evaluation of teaching is a subjective decision not easily quantified, therefore, the development of standards for teaching that are totally quantifiable is not practical nor is it desirable. Rather, the quality of teaching is evidenced by what students take from a course, relative to where they began, and to their ability. Accordingly, the quality of the instructional process is influenced by many variables including the nature of the course; quality and motivation of the students enrolled; and instructor workload and other obligations. The teacher's ability to influence and/or control these variables may be different from course to course.

Examples of Teaching Activities

Evaluation of teaching activities will include, but is not limited to, the following (in no particular order):

1. Student evaluations
2. Teaching awards
3. Peer review, especially by faculty colleagues familiar with the nominee's teaching area
4. Participation in teaching-focused development activities to improve teaching quality
5. Cumulative professional judgment by the Department Chair
6. Use of high impact practices
7. The difficulty of the courses taught
8. Development of new courses or significant revision of existing courses
9. Course preparation with less than two weeks' notice
10. Self-created graded items
11. Innovative use of technology for teaching

12. Anecdotal evidence from students, faculty, staff, and others both from within and outside of the University
13. Class size
14. Assumption of a number of directed studies and/or participation in one or more graduate thesis committees
15. A course load requiring more than two preps in a single semester
16. Quality of course syllabi course objectives, and other instructional material created by and/or used by the instructor
17. Completing program assessment activities
18. Quality of advising, mentoring, and student supervision practices
19. Accomplishment of special teaching assignments (e.g., capstone course, honors course)
20. Course improvement based on student feedback
21. Availability to students and other instructional support practices
22. Other teaching-related activities

Expectations for Annual Evaluation: Teaching

The evaluation of teaching covers activity for the preceding academic year (one year). Individuals should also refer to the multi-year expectations for teaching for promotion (Appendix 2), tenure (Appendix 3), and/or post-tenure review (Appendix 4), as applicable.

Because the University is primarily a teaching institution, high-quality teaching is expected. Recognizing the existence of many variables that affect teaching and the subjective nature of the evaluation process, an evaluation of teaching should be a decision made by the Chair following the categories of performance and descriptors listed below. Evaluation ratings for teaching will be based on both quantitative and qualitative factors. The Chair’s evaluation may be appealed.

A base quantitative score will be determined by dividing the sum of the Student Assessment of Instruction (SAI) ratings of “Excellent” and “Very Good” for the “overall assessment of instructor” item across all in-load courses by the total number of SAI responses for all courses. The percent of “Excellent” and “Very Good” student ratings will be aligned with base teaching evaluation ratings from the following table:

Evaluation Rating	Percent of “Very Good” and “Excellent” Ratings
Exceeds Expectations	60% or above
Meets Expectations	50%-59.9%
Does not Meet Expectations	40%-49.9%
Unsatisfactory	Below 40%

Qualitative factors are included in the list of example teaching activities above. Each of these activities may increase the base teaching evaluation rating by up to 5%, and the cumulative increase for all activities may be up to 25%.

Evaluation Standards for Service

Overview of Service Evaluation

These guidelines represent a baseline, or reference point, that the Chair may use for the evaluation of service. Depending on the circumstances, the Chair may deviate from these guidelines. For example, the Chair may conclude that active participation in a particular service responsibility has a greater contribution to our mission than some other responsibilities. Major deviations should be agreed to before time. Examples of deviations include, but are not limited to, the following:

- Officer of a national discipline-specific organization
- Faculty Senate membership

Examples of Service Activities

Service within the University may include, but is not limited to, the following activities (listed in no particular order):

1. Participation and/or leadership on University, College, or Department groups (e.g., faculty senate, personnel committees, councils, committees, task forces, work groups, advisory panels)
2. Supporting/advising student organizations, especially those associated with the College of Business
3. Development and participation in continuing education programs
4. Travel time to and from remote campus locations

Service to the Profession is primarily external to the University and is focused on service related to an academic discipline and/or discipline-based organizations. It may include, but is not limited to, the following activities (listed in no particular order):

1. Holding office or major committee appointments in national or regional professional/academic organizations
2. Serving as editor, reviewer, or member of an editorial review board for professional/academic journals or proceedings
3. Participation in professional/academic meetings and seminars as session chair, moderator, or other significant role
4. Consulting in one's area of expertise
5. Attendance at workshops, seminars, and short courses in one's area of specialization
6. Other professional activities associated with one's discipline that inform, acquaint, and develop research and teaching abilities

Service to the Community is primarily external to the University and may include, but is not limited to, the following activities (listed in no particular order):

1. Active participation in civic and community organizations
2. Active participation in regional/community development/service organizations
3. Holding office or major committee appointments in community organizations
4. Talks, interviews, or other presentations to civic/community organizations and/or media outlets

5. Consulting in one’s area of expertise

Expectations for Annual Evaluation: Service

The evaluation of service covers activity for the preceding academic year (one year). Individuals should also refer to the multi-year expectations for service related to promotion (Appendix 2), tenure (Appendix 3), and/or post-tenure review (Appendix 4), as applicable.

Recognizing the importance of service activities for all faculty, the following annual evaluation ratings will be used for all faculty except tenure-earning faculty (see Tenure-Earning Exception section below).

Rating	Description of Service Activities
Exceeds Expectations	Activity beyond the level required for “meets expectations”
Meets Expectations	Activity in two of the above in any combination
Does not Meet Expectations	Activity in one of the above
Unsatisfactory	No service

Tenure-Earning Exception

Recognizing and supporting the need of tenure-earning faculty to focus on scholarly and creative activities and teaching, tenure-earning faculty have the following annual evaluation ratings with respect to service activities.

Rating	Description of Service Activities
Exceeds Expectations	Activity beyond the level required for “meets expectations”
Meets Expectations	Activity in one of the above
Does not Meet Expectations	No service for the past year
Unsatisfactory	No service for the past two years

Evaluation Standards for Scholarly and Creative Activity

Overview of Scholarly and Creative Activity Evaluation

Focusing on the tangible results of scholarly and creative activities for a single year results in an unreliable, volatile, and potentially inaccurate measure of productivity. In many cases, scholarship/creative efforts are in process for several years before completion. Therefore, a twelve-month evaluation period is too short an interval for a realistic and meaningful measure of scholarship/creative productivity. Such a myopic focus could result in a rating of “Exceeds Expectations” one-year followed by a rating of “Unsatisfactory” in the next, when there may be no substantive difference in faculty efforts during those two years. Accordingly, the Department defines the relevant review period to include the current year plus the previous two years (a rolling three-year year evaluation period).

For annual evaluation purposes, the Chair should use the publication or presentation date of the scholarship/creative activity to determine the year of record. If the activity does not result in publication or presentation, the Chair should use his or her judgment in determining the date of record.

A primary mission of the College of Business includes providing a high-quality educational experience. To pursue this mission, research-oriented faculty conduct scholarly/creative activities that support their teaching. Accordingly, the Department adopts the following scholarship values:

- Faculty members should make scholarly/creative contributions and share the results with colleagues, students, and the professional community. These contributions may relate specifically to the faculty member's disciplines and/or to the broader academic discipline of business education.
- Scholarly/creative activities may be basic (focusing on discovery of new knowledge), applied (focusing on the synthesis or applications of existing knowledge), or instructional (designed to advance the practice or instruction of the faculty member's discipline). Basic research is recognized and considered a valuable scholarship contribution. However, the Department's primary mission is high-quality instruction, therefore the Department places equal value on applied, instructional, and basic research. Additionally, to reach a wide audience, it is often more practical for faculty to disseminate their findings via presentations at professional/academic conferences than more traditional, less widely read outlets, such as academic journals.
- Scholarly/creative activities should be consistent with and supportive of the faculty member's areas of teaching.
- Scholarly/creative activities should support the educational experience of a wide range of constituents, including on-campus students, distance-learning students, and professionals seeking continuing education.
- The results of scholarly/creative activities should be disseminated. A scholarly/creative activity that is not widely distributed or heard by a large audience, or that is designed only for use within the College or the Department, is useful and valuable. However, the scholarly/creative activity is more valuable when that intellectual effort is subjected to wider scrutiny within the professional or academic community.

Guidelines for Teaching-Track Faculty

Faculty assigned to a teaching track place greater emphasis on instruction, service, and maintenance of academic status, usually as either a Practice Academic or as an Instructional Practitioner. As a result, less emphasis is placed on tangible evidence of scholarship and creative activities. In the Department's view, a faculty member who is responsible for teaching more courses and perhaps more preparations during the academic year should have minimal expectations of scholarly and creative output as measured by articles and proceedings. Such faculty should focus their scholarly and creative efforts on maintaining and improving mastery of the current literature and professional practice. To this end, teaching track faculty should focus scholarly and creative activities in the areas of attendance at and participation in professional conferences, continuing professional education programs, consulting projects, and preparation of new teaching materials and methodologies.

Examples of Scholarly and Creative Activities

Scholarly/creative activities may include, but are not limited to, the following:

1. Peer-reviewed article published in professional or academic journals, trade journals, proceedings, and/or periodicals
2. Editorially-reviewed article published in professional or academic journals, trade journals, proceedings, and/or periodicals
3. Papers presented at professional or academic conferences, symposiums, and/or seminars
4. Cases published in a journal, casebook, textbook, or proceedings
5. Participation in professional/academic meetings and seminars as discussant or another significant role (other than presenter and session chair)
6. Published book, edited book, book revisions, case book, book chapters
7. Monograph, bibliography, book review, or abstract
8. Textbook, textbook chapter, practice set, study guide, test bank or other textbooks supplementary materials
9. Published computer simulation, software, or instructional materials
10. Publicly available materials describing the design and implementation of new curricula or courses
11. Grants awarded and reports related to funded research
12. Examination questions that are reviewed by practicing professionals and accepted for publication as a component of a professional certification examination (e.g., CPA exam, CMA exam, CFP exam)
13. Earning nationally recognized professional certifications such as CPA, CMA, CIA, CFA, CFP, CFE, and ChFC
14. Development, preparation, and/or presentation of professional continuing education programs
15. Consulting projects, internships, or other scholarly or creative activity that is equivalent, as determined by the Department Chair on a case-by-case basis
16. Drafts/working papers and research in progress
17. Recognition via professional honors and awards (e.g., the Florida Institute of CPA's Educator of the Year, the American Accounting Association's Educator of the Year) that are based upon the totality of the individual's contributions in the areas of teaching, service, and scholarly and creative activities
18. Other contributions based upon the Chair's evaluation

Peer Reviewed Articles and Equivalent

For purposes of this policy, a peer-reviewed article is defined as any of the following:

- A peer-reviewed article or case in a journal listed in Cabell's directory or a similar public list intended to indicate the quality of publications
- An editorially-reviewed article in a journal that utilizes an editorial board or committee that is widely acknowledged as possessing expertise in the faculty member's field
- An equivalent publication, but only on a limited basis as described below

The following may be considered equivalent to one peer-reviewed article to the extent that the activity represents a scholarly activity equivalent to a peer-reviewed article. Equivalents will be judged on a case-by-case basis by the Chair of the Department.

1. A published book, textbook, book chapters, or research monograph
2. Published computer simulation/software, instructional guide, study guide used by an institution other than UWF
3. Business cases published in a casebook or textbook used at an institution other than UWF
4. Four peer-reviewed papers presented and/or published in proceedings of international, national, and regional, meetings
5. Creation of eight hours of professional continuing education programs or executive education courses. Faculty member should provide tangible evidence of the program to the Chair for evaluation
6. Twenty examination questions that are reviewed by practicing professionals and accepted for publication as a component of a professional certification examination, e.g., the CPA exam
7. Grants awarded and reports related to funded research
8. Other scholarly or creative activity that is equivalent, as determined by the Department Chair on a case-by-case basis

Guidelines for Evaluating the Quality of Intellectual Contributions

These guidelines establish criteria for ensuring that the scholarly and creative activities approved within the Department's Bylaws meet a standard of quality consistent with the College's mission while guarding against publishing in predatory journals. To meet the Department's quality standards, scholarly and creative activities should meet four tests:

1. Exist in public written form
2. Be relevant to the faculty member's expertise
3. Be consistent with the mission of the College of Business
4. Have been subject to scrutiny by academic peers or practitioners prior to publication
 - For journal publications, this scrutiny can be justified by the journal meeting one or more of the following criteria:
 - ◆ A well-regarded editor¹ with information about institutional affiliation and contact procedures
 - ◆ A recognized professional submission system
 - ◆ A well-regarded journal, university, and/or professional society publisher
 - ◆ Journal has a professional archive system
 - ◆ Journal provides a reasonable review period

¹ 2020 Guiding Principles and Standards for Business Accreditation, Updated July 1, 2022. Association to Advance Collegiate Schools of Business (AACSB). Retrieved from <https://www.aacsb.edu/eductors/accreditation/business-accreditation/aacsb-business-accreditation-standards>. Accessed September 1, 2022; Grudniewicz, Agnes et al., "Predatory journals: no definition, no defence." *Nature* (2019, December 11). Retrieved from <https://www.nature.com/articles/d41586-019-03759->; and <https://libguides.uwf.edu/ScholarlyCommunication/evalOAJournals>. Accessed September 1, 2022.

- ◆ Documentation demonstrating the journal is listed on a well-regarded journal quality index, such as:
 - Australian Business Deans Council Journal Quality List
 - Chartered Association of Business Schools Academic Journal Guide
 - Clarivate Journal Citation Reports
 - Cabell’s Journalytics with a documented peer-review process and an acceptance rate of 50% or less
 - Scimago Journal and Country Rank
 - Eigenfactor Journal Ranking
 - For law review articles, publication in journals representing ABA-accredited law schools or journals appearing in the Washington and Lee Law Journal Rankings are acceptable indicators of quality
- For books, textbooks, instructional guides, cases, software, editorially-reviewed publications, and all other acceptable forms of scholarly and creative activities (as defined by the Department’s Bylaws), additional sources of scrutiny can be used to assess quality, such as
 - ◆ A well-regarded editorial board or list of reviewers
 - ◆ A well-regarded publisher, university, government agency, research lab, and/or professional society
 - ◆ The Chair’s discretion

Because neither Cabell’s nor the Australian Business Deans Council Journal Quality List includes a sufficient number of law review journals, publications in the following outlets will be considered A* publications.

- The *American Business Law Journal*, *Business Lawyer*, and the *Journal of Business Ethics*
- In addition, law-related journals that meet one or more of the following requirements, as of the date of publication, will also be treated as A* publications:
 - Journals (law reviews) published by the top 60 American Bar Association-accredited law schools as ranked by the U.S. News & World Report Annual Rankings
 - The top 320 journals as ranked by the Washington & Lee Law Journal Rankings

Deceptive, fraudulent, and/or predatory journals^{2,3} do not meet the Department’s quality standards. Some red flags for these types of journals include things such as:

1. The journal does not have an editor or editor contact information
2. The review period for the journal is excessively short
3. Journals requiring a charge for submission and/or publication

² 2020 Guiding Principles and Standards for Business Accreditation and “Predatory journals: no definition, no defence.”

³ “Scholarly Communication: Predatory Journals & Publishers.” LibGuides. Accessed September 28, 2022. Retrieved from <https://libguides.uwf.edu/ScholarlyCommunication/evalOAJournals>.

Expectations for Annual Evaluation: Scholarly and Creative Activities

The evaluation period for scholarly and creative activities covers three (3) academic years, the current academic year and the two prior academic years. Individuals should also refer to the multi-year expectations for service related to promotion (Appendix 2), tenure (Appendix 3), and/or post-tenure review (Appendix 4), as applicable.

Exceeds Expectations	Activity beyond the level required for “meets expectations”
Meets Expectations	<ul style="list-style-type: none"> • Qualified pursuant to AACSB “faculty qualifications status” as defined in the College Policy on Faculty Qualifications and Sustained Engagement for AACSB Accreditation Purposes <p>AND</p> <ul style="list-style-type: none"> • Published one peer-reviewed journal article during the 3-year review period
Does not Meet Expectations	<ul style="list-style-type: none"> • Qualified pursuant to AACSB “faculty qualifications status” as defined in the College Policy on Faculty Qualifications and Sustained Engagement for AACSB Accreditation Purposes <p>AND</p> <ul style="list-style-type: none"> • Has no peer-reviewed or editorially-reviewed journal articles but does have two or more other intellectual contributions from the examples of scholarly and creative activities (provided earlier in this appendix) during the 3-year review period
Unsatisfactory	<ul style="list-style-type: none"> • Not qualified pursuant to AACSB “faculty qualifications status” as defined in the College Policy on Faculty Qualifications and Sustained Engagement for AACSB Accreditation Purposes <p>OR</p> <ul style="list-style-type: none"> • Qualified pursuant to AACSB “faculty qualifications status” as defined in the College Policy on Faculty Qualifications and Sustained Engagement for AACSB Accreditation Purposes but has fewer than two intellectual contributions from the examples of scholarly and creative activities (provided earlier in this appendix) during the 3-year review period

The guidelines above represent a baseline, or reference point, that the Chair may use for evaluation of scholarship and creative activities. Depending on the circumstances, the Chair may (but is not required to) deviate from these guidelines. For example:

- A particular journal should be weighed more heavily because it has significant prestige and/or outstanding contribution to our mission
- Certain editorially-reviewed journals may be deemed to have greater prestige and/or to make a greater contribution to our mission than some peer-reviewed journals
- Newly hired faculty may have their scholarly and creative activity evaluated more leniently than the descriptors indicated above for no longer than the first two years from their initial appointment date. Once this exception is no longer applied, the regular

annual evaluation expectations for scholarly and creative activity will include the current year and all prior years in the evaluation period.

Weighting of Performance Categories

When each faculty member submits his/her annual statement of contributions, the faculty member may determine the percent of the overall annual evaluation rating that will be based on each of the three evaluation categories: teaching, service, and scholarly and creative activity. This weighting will apply to the activities in the current year's statement of contributions. The weighting of any or all evaluation categories may change from year to year.

For faculty who are required to participate in scholarly and creative activity, the weighting of each category must be within the following ranges:

Teaching:	40%-50%	(40% default)
Service:	20%-40%	(20% default)
Scholarly Activity:	20%-40%	(40% default)

For faculty who are not required to participate in scholarly and creative activity, the weighting of each category must be within the following ranges:

Teaching:	50%-70%	(60% default)
Service:	30%-50%	(40% default)
Scholarly Activity:	not applicable/no evaluation given	

The sum of the percentage weights across all evaluation categories must equal 100%. If no allocation is specified by the faculty member, the default percentages listed above will be used. If there is a conflict between the Chair's evaluation and a faculty member's self-evaluation, the faculty member may specify new weights for each category, within the requirements stated above, as part of a rebuttal letter to the Chair's evaluation.

Overall Annual Evaluation Ratings

When computing the overall annual evaluation rating, the Chair will equate each rating with a corresponding numerical value, as follows:

Exceeds Expectations = 4
Meets Expectations = 3
Does not Meet Expectations = 2
Unsatisfactory = 1

The Chair will then multiply the percentage weights provided by the faculty member in his/her statement of contributions by the rating for each of the three evaluation areas: teaching, service, and scholarly activity. The result for each of the three evaluation areas will then be summed and rounded to the nearest whole number, as follows:

A sum of 3.5 to 4 = 4
A sum of 2.5 to less than 3.5 = 3

A sum of 1.5 to less than 2.5 = 2

A sum of less than 1.5 = 1

The resulting sum will then be converted to a single, overall annual evaluation rating using the same scale used to convert the evaluation category ratings to numerical values, as follows:

4 = Exceeds Expectations

3 = Meets Expectations

2 = Does not Meet Expectations

1 = Unsatisfactory

The examples in the following table illustrate the implementation of this process.

	Evaluation Category	Verbal Rating	Numerical Rating	x	Category Weight	=	Result	
Faculty 1	Teaching	Meets	3	x	40%	=	1.20	
	Service	Exceeds	4	x	25%	=	1.00	
	Scholarly Activity	Exceeds	4	x	35%	=	1.40	
	Overall Annual Evaluation Value							3.60
	Overall Annual Evaluation Rating							Exceeds
Faculty 2	Teaching	Meets	3	x	40%	=	1.20	
	Service	Meets	3	x	40%	=	1.20	
	Scholarly Activity	Does not Meet	2	x	20%	=	0.40	
	Overall Annual Evaluation Value							2.80
	Overall Annual Evaluation Rating							Meets
Faculty 3	Teaching	Exceeds	4	x	50%	=	2.00	
	Service	Meets	3	x	20%	=	0.60	
	Scholarly Activity	Meets	3	x	30%	=	0.90	
	Overall Annual Evaluation Value							3.50
	Overall Annual Evaluation Rating							Exceeds

Appendix 2: Policies and Procedures for Promotion

Overview of Evaluation for Promotion

The Department affirms the mission of the College and of the University as a regional comprehensive university. A candidate for promotion should demonstrate competence in the areas of teaching, service, and scholarship and creative activities. The faculty of the Department recognizes that teaching (our primary mission) must be supported by service as well as scholarship and creative activities. These three endeavors are interdependent, and the quality of our performance in teaching and service is shaped to a large degree by the scholarship and creativity of our faculty. Scholarship within the various specialties of a faculty member's discipline includes a wide variety of research, scholarship, and creative activities as defined and judged within each academic discipline.

The review period for promotion is typically the immediately preceding four to six academic years, depending on when the candidate applies for promotion and the type of promotion for which the candidate applies (e.g., promotion to associate professor or professor). Because the evaluation for promotion is a comprehensive, holistic review of activities over an extended period, high ratings on annual evaluations do not guarantee a successful promotion outcome although high ratings should indicate a higher likelihood of being granted a promotion. However, the outcome is influenced by the quality of intellectual and departmental contributions as evaluated by Department, College, and University peers. Individuals should also refer to the multi-year expectations related to tenure (Appendix 3) as applicable.

The categories of performance used in the promotion processes for teaching, service, and scholarly and creative activities are as follows: exceeds expectations, meets expectations, does not meet expectations, and unsatisfactory, as defined in Appendix 1. The Chair will make the determination as to whether a candidate's teaching, service, or scholarly and creative activity is rated as exceeds expectations, meets expectations, does not meet expectations, or is unsatisfactory. The Chair's determination will incorporate the annual evaluations. Examples of the criteria used to evaluate teaching, service, and scholarly and creative activity are provided in Appendix 1. The following sections specify the *minimum* expectations for promotion.

University Criteria for Promotion Decisions

The Department acknowledges the University's minimum standards for promotion. If any Departmental standard for promotion is found to be lower or less stringent than the University's standard for promotion, then the University's higher standard for promotion will prevail.

College Criteria for Promotion Decisions

The College of Business requires that a candidate for promotion must be qualified, pursuant to faculty categories as detailed in AACSB Standard 3 as well as the College document on Faculty Qualifications, at the time the application is submitted. In addition, the candidate must demonstrate a consistent record of scholarly activities. The record of scholarship must include

publications in peer-reviewed journals as well as other intellectual contributions as defined by the Departmental standards for annual evaluation which may be higher than the minimum requirements for eligibility.

Department Criteria for Promotion Decisions

The Department standards are consistent with the primary mission of the College, which is to provide a high-quality educational experience. Scholarly and creative activities may be basic (focusing on the discovery of new knowledge), applied (focusing on the synthesis or applications of existing knowledge), or instructional (designed to advance the practice or instruction of the faculty member’s discipline and/or the broader discipline of business education). Basic research is recognized and considered a valuable scholarship contribution. However, because the Department’s primary mission is high-quality instruction, the Department places equal value on applied, instructional, and basic research. The Department recognizes our University’s mission as a regional comprehensive university and, therefore, our scholarly efforts should serve regional interests as well as national constituents. Therefore, presentations at regional professional and academic conferences are valued as scholarly intellectual contributions.

Expectations for Promotion: Annual Evaluations

The table below summarizes the annual evaluation ratings for teaching, service, and scholarly and creative activities that must be achieved during the evaluation period for a candidate to be *eligible for promotion*. Meeting Departmental standards makes the candidate eligible to apply for promotion but does not guarantee any specific outcome.

Promotion to:	Teaching	Service	Scholarship and Creative Activities
Senior Instructor or Senior Lecturer	<ul style="list-style-type: none"> No less than a majority of “Meets Expectations” (or Excellent*) annual evaluation ratings <p>AND</p> <ul style="list-style-type: none"> At least two “Exceeds Expectations” (or Distinguished*) annual evaluation ratings in BOTH Teaching AND Service 		If applicable, no less than a majority of “Meets Expectations” (or “Excellent”) annual evaluation ratings
Senior Research Associate	If applicable, no less than a majority of “Meets Expectations” (or “Excellent”) annual evaluation ratings	<ul style="list-style-type: none"> No less than a majority of “Meets Expectations” (or Excellent*) annual evaluation ratings <p>AND</p> <ul style="list-style-type: none"> At least two “Exceeds Expectations” (or Distinguished*) annual evaluation ratings in BOTH Service and Scholarly and Creative Activities 	
Associate Professor	<ul style="list-style-type: none"> No less than a majority of “Meets Expectations” (or Excellent*) annual evaluation ratings <p>AND</p> <ul style="list-style-type: none"> At least two “Exceeds Expectations” (or Distinguished*) annual evaluation ratings in EITHER Teaching OR Scholarly & Creative Activities 		

Professor	<ul style="list-style-type: none"> • No less than a majority of “Meets Expectations” (or Excellent*) annual evaluation ratings AND • At least two “Exceeds Expectations” (or Distinguished*) annual evaluation ratings in BOTH Teaching AND Scholarly & Creative Activities
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* “Excellent” and “Distinguished” refer to ratings from the five-level annual evaluation ratings system used prior to the pre-2023-2024 academic year.

Expectations for Promotion: Teaching

Because the University is primarily a teaching institution, excellence in teaching is expected for promotion. Evaluation of excellence will include, but is not limited to, the examples listed in Appendix 1: Policies Procedures for Annual Evaluation.

Expectations for Promotion: Service

Because service is an integral part of faculty responsibilities, evidence of consistent and meaningful service to the Department, the College, the University, and the community is expected for promotion. Specific examples of service activities that will be evaluated are listed in Appendix 1: Policies and Procedures for Annual Evaluation.

Expectations for Promotion: Scholarly and Creative Activities

A faculty member must maintain a record of continued productivity over time, and a minimum of three (3) peer-reviewed articles must be published after appointment at UWF. Up to one (1) of these peer-reviewed articles may be satisfied by substitution from the list of “Peer Reviewed Articles and Equivalents” in Appendix 1: Policies and Procedures for Annual Evaluation. The following guidelines must also be met with respect to promotion between ranks.

- From Assistant Professor to Associate Professor: At least four (4) peer-reviewed articles. Up to one (1) of these peer-reviewed articles may be satisfied by substitution from the list of “Peer Reviewed Articles and Equivalents” in Appendix 1: Policies and Procedures for Annual Evaluation.
- From Associate Professor to Professor: At least 8 articles (including those published prior to promotion to Associate Professor) with at least four (4) being published after submission of the dossier for promotion to Associate Professor. Up to two (2) of the eight (8) required peer-reviewed articles may be satisfied by substitution from the list of “Peer Reviewed Articles and Equivalents” in Appendix 1: Policies and Procedures for Annual Evaluation.

Appendix 3: Policies and Procedures for Tenure

Overview of Evaluation for Tenure

The Department affirms the mission of the College and of the University as a regional comprehensive university. A candidate for tenure should demonstrate competence in the areas of teaching, service, and scholarship and creative activities. The faculty of the Department recognizes that teaching (our primary mission) must be supported by service as well as scholarship and creative activities. These three endeavors are interdependent, and the quality of our performance in teaching and service is shaped to a large degree by the scholarship and creativity of our faculty. Scholarship within the various specialties of a faculty member's discipline includes a wide variety of research, scholarship, and creative activities as defined and judged within each academic discipline.

The review period for tenure is typically the immediately preceding four to six academic years, depending on when the candidate applies for tenure. Because evaluation for tenure is a comprehensive, holistic review of activities over an extended period, high ratings on annual evaluations do not guarantee a successful tenure outcome although high ratings should indicate a higher likelihood of being granted tenure. However, the outcome is influenced by the quality of intellectual and departmental contributions as evaluated by Department, College, and University peers. Individuals should also refer to the multi-year expectations related to promotion (Appendix 2) as applicable.

The categories of performance used in the tenure processes for teaching, service, and scholarly and creative activities are as follows: exceeds expectations, meets expectations, does not meet expectations, and unsatisfactory as defined in Appendix 1. The Chair will make the determination as to whether a candidate's teaching, service, or scholarly and creative activity is rated as exceeds expectations, meets expectations, does not meet expectations, or is unsatisfactory. The Chair's determination will incorporate the annual evaluations. Examples of the criteria used to evaluate teaching, service, and scholarly and creative activity are provided in Appendix 1. The following sections specify the *minimum* expectations for tenure.

University Criteria for Tenure Decisions

The Department acknowledges the University's minimum standards for tenure. If any Departmental standard for tenure is found to be lower or less stringent than the University's standard for tenure, then the University's higher standard for tenure will prevail.

College Criteria for Tenure Decisions

The College of Business requires that a candidate for tenure must be qualified, pursuant to faculty categories as detailed in AACSB Standard 3 as well as the College document on Faculty Qualifications, at the time the application is submitted. In addition, the candidate must demonstrate a consistent record of scholarly activities. The record of scholarship must include publications in peer-reviewed journals as well as other intellectual contributions as defined by

the departmental standards for annual evaluation which may be higher than the minimum requirements for eligibility.

Department Criteria for Tenure Decisions

The Department standards are consistent with the primary mission of the College, which is to provide a high-quality educational experience. Scholarly and creative activities may be basic (focusing on the discovery of new knowledge), applied (focusing on the synthesis or applications of existing knowledge), or instructional (designed to advance the practice or instruction of the faculty member’s discipline and/or the broader discipline of business education). Basic research is recognized and considered a valuable scholarship contribution. However, because the Department’s primary mission is high-quality instruction, the Department places equal value on applied, instructional, and basic research. The Department recognizes our University’s mission as a regional comprehensive university and, therefore, our scholarly efforts should serve regional interests as well as national constituents. Therefore, presentations at regional professional and academic conferences are valued as scholarly intellectual contributions.

Expectations for Tenure: Annual Evaluations

The table below summarizes the annual evaluation ratings for teaching, service, and scholarly and creative activities that must be achieved during the evaluation period for a candidate to be *eligible for tenure*. Meeting departmental standards makes the candidate eligible to apply for tenure but does not guarantee any specific outcome.

Tenured at the level of:	Teaching	Service	Scholarship and Creative Activities
Associate Professor	<ul style="list-style-type: none"> No less than a majority of “Meets Expectations” (or Excellent*) annual evaluation ratings <p>AND</p> <ul style="list-style-type: none"> At least two “Exceeds Expectations” (or Distinguished*) annual evaluation ratings in EITHER Teaching OR Scholarly & Creative Activities 		
Professor	<ul style="list-style-type: none"> No less than a majority of “Meets Expectations” (or Excellent*) annual evaluation ratings <p>AND</p> <ul style="list-style-type: none"> At least two “Exceeds Expectations” (or Distinguished*) annual evaluation ratings in BOTH Teaching AND Scholarly & Creative Activities 		

* “Excellent” and “Distinguished” refer to ratings from the five-level annual evaluation ratings system used prior to the pre-2023-2024 academic year.

Expectations for Tenure: Teaching

Because the University is primarily a teaching institution, excellence in teaching is expected for tenure. Evaluation of excellence will include, but is not limited to, the examples listed in Appendix 1: Policies and Procedures for Annual Evaluation.

Expectations for Tenure: Service

Because service is an integral part of faculty responsibilities, evidence of consistent and meaningful service to the Department, the College, the University, and the community is expected for tenure. Specific examples of service activities that will be evaluated are listed in Appendix 1: Policies and Procedures for Annual Evaluation.

Expectations for Tenure: Scholarly and Creative Activities

A faculty member must maintain a record of continued productivity over time, and the following guidelines must also be met with respect to tenure.

- Tenure at the rank of Assistant Professor
 - At least three (3) peer-reviewed journal articles.
 - Up to one (1) of these peer-reviewed articles may be satisfied by substitution from the list of “Peer Reviewed Articles and Equivalents” in Appendix 1: Policies and Procedures for Annual Evaluation.
- Tenure at the rank of Associate Professor
 - At least four (4) peer-reviewed journal articles.
 - Up to one (1) of these peer-reviewed articles may be satisfied by substitution from the list of “Peer Reviewed Articles and Equivalents” in Appendix 1: Policies and Procedures for Annual Evaluation.
- Tenure at the rank of Professor
 - At least eight (8) peer-reviewed journal articles, including those published prior to promotion to Associate Professor.
 - Up to four (4) of these peer-reviewed articles may be satisfied by substitution from the list of “Peer Reviewed Articles and Equivalents” in Appendix 1: Policies and Procedures for Annual Evaluation.
 - At least three (3) of these peer-reviewed articles must be published after appointment at UWF.
 - Of the three (3) peer-reviewed articles that are required to be published after appointment at UWF, up to two (2) may be satisfied by substitution from the list of “Peer Reviewed Articles and Equivalents” in Appendix 1: Policies and Procedures for Annual Evaluation.

Appendix 4: Policies and Procedures for Post-Tenure Review

The University of West Florida adheres to Florida Board of Governors' Regulation 10.003, as well as Article 11 of the Collective Bargaining Agreement, in all matters relating to post-tenure review.

When applicable, a faculty member's 5-year post-tenure review rating will be the modal rating of that faculty member's overall annual evaluation ratings. In the case of a bi-modal distribution, the higher rating level will prevail. The examples in the following table illustrate the implementation of this process. For faculty who take a full year sabbatical, the PTR rating will be based on the remaining 4 years in the 5-year review period.

	Overall Annual Evaluation Ratings					5-Year PTR Rating
	Year 1	Year 2	Year 3	Year 4	Year 5	
Faculty 1	Exceeds	Meets	Meets	Does not Meet	Meets	Meets (Meets =3)
Faculty 2	Exceeds	Meets	Exceeds	Exceeds	Meets	Exceeds (Exceeds = 3)
Faculty 3	Meets	Meets	Does not Meet	Meets	Meets	Meets (Meets = 4)
Faculty 4	Does not Meet	Does Not Meet	Meets	Meets	Exceeds	Meets <u>bimodal</u> : does not meet/meets, therefore higher rating prevails