
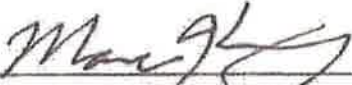
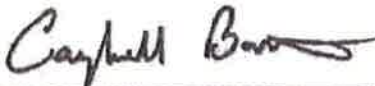

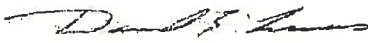



Roles, Scope, Criteria, Standards and Procedures  
of the  
College of Extension  
(Name of Department/School/College)

Effective Date: July 1, 2019

APPROVALS	SIGNATURE	DATE
Roni Baker		8/26/19
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Marc King		8-21-19
Department Faculty	Chair, Central Region Primary Review Committee	
Campbell Barrett		8/21/2019
Department Faculty	Chair, Western Region Primary Review Committee	
Larry Brence		8/16/2019
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Primary Administrative Reviewer	Department Head/Director Central Region	
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Primary Administrative Reviewer	Department Head/Director Western Region	
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9/4/19

Intermediate Administrative Reviewer

College Dean/Executive Director of Extension

DAVID J SINGEL



University Retention, Tenure and Promotion

Chair, University Retention, Tenure and Promotion

ROBERT L. MOKWA

 10-9-19

Provost

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

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

### **College**

The faculty, staff, and administrators in Extension (College) support the fulfillment of the Institution's teaching, research, and service mission.

The Role and Scope of Extension devolves from the mission:

***MSU Extension improves 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.***

Engagement, integration, and off-campus education are essential obligations of land grant universities. At Montana State University, Extension is a primary provider of community-based engagement, issue-focused instruction and technical assistance for citizens across the state. Educational activities conducted by Extension do not lead toward degrees but serve persons of all ages, races, genders, ethnicities and demographics.

Extension scholarship 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.

Extension faculty engage in scholarly activities. Scholarship in Extension encompasses the application of knowledge, the engagement of scholars with the people of the state and the way scholars teach. Extension scholarship is intellectual work whose significance and relevance are validated by one's peers and such work is communicated to others so that human knowledge advances and so that others can improve educational programs. More specifically, such work—in its diverse forms—is based on a high level of professional expertise grounded in an identifiable body of knowledge; original; relevant and valued by those who would use it; must be documented and validated through peer review or critique; and must be communicated in appropriate ways so as to have impact on or significance for various publics beyond the university, or for the discipline itself. Such scholarship fulfills the mission of the land-grant university.

Educational activities conducted by Extension are focused within four primary

categories. These activities are designed to:

1. Help agricultural producers, land and resource managers, agribusiness managers, and others to become more successful;
2. Assist individuals and families to improve their quality of life through increased economic and social stability, better nutrition and health, and enhanced management skills;
3. Advance positive youth development through 4-H experiential projects and activities that will enable youth to establish life goals and become productive citizens; and
4. Educate people in processes useful in arriving at public decisions that will enhance community economic and social well-being.

The College is comprised of the following departments

- Extension Field Faculty Housed in Regions (Eastern, Central, and Western)
- Montana 4-H Center for Youth Development
- 

Extension Faculty includes

- Field Faculty (referred to as county faculty, county agents or extension agents) who plan and conduct instruction focused on local needs and,
- Campus-based Specialists who are subject matter experts and resources to agents and clientele.

Field Faculty are accountable to the Executive Director of Extension through Regional Department Heads. Most Extension Specialists are faculty within academic departments, accountable to their respective department heads and are guided by their respective Department's Role and Scope document.

Exceptions to departmentalized Extension specialists are:

- 4-H youth development faculty, who are organized within the 4-H Center for Youth Development. These specialists report to the Director of the 4-H Center for Youth Development.
- Additional Extension Faculty not attached to another MSU college or department who report directly to the Director of Extension, or her/his designee.

Montana State University is served by a faculty with a wide range of skills, interests, and responsibilities. Thus, different faculty members may have very different teaching, research/creative activity and service assignments, as outlined in the faculty member's letter of hire or subsequently negotiated role statement.

## **Department**

Extension Field Faculty (department) support the fulfillment of the Institution's mission.

MSU Extension is divided into three regions: Western, Central, and Eastern. All Extension Regions share the same Role and Scope.

**Teaching:** Extension Field Faculty programs are non-formal (i.e., they do not lead to academic degrees). Extension Field Faculty develop and deliver 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.

**Scholarship:** Extension Scholarship encompasses the application of knowledge, the engagement of scholars with the broader state and the way scholars teach. Extension county and reservation faculty are responsible for developing and delivering educational programs and technical assistance to communities across Montana in the four primary areas of Extension as referenced previously in the Extension College section.

**Service:** Extension Field Faculty will become involved in their respective communities through civic and voluntary associations. Once established in their community-based roles, field faculty will participate in Extension and University committees/professional activities, professional associations, and/or other organizations beyond the local level. 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**

### **College**

In Extension, each Regional Department Head and the Director of the 4-H Center for Youth Development

assign a proposed annual review rating to each faculty member. These proposed ratings are approved by the Director of Extension.

### **Department**

Procedures for annual review for Extension Field Faculty follow the Extension requirements with the following addition: The Regional Department Heads meet to ensure consistency of ratings across Extension Field Faculty.

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

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

The Regional Department Review Committee shall include **three tenured** field faculty within the region. When possible, a minimum of two committee members will be full professors. Two faculty committee representatives will be nominated and elected by tenure 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.

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

For the purposes of this role and scope document the Regional Department Head (RDH) serves as the review administrator for Field Faculty and the 4-H Center Director serves as the review administrator for 4-H Center Faculty.

#### **Section 4.03 Identification of responsible entities**

The Regional Department Head will:

1. Establish the Primary Committee either by facilitating the election or appointment of the members as described.
2. Establish, select, and solicit internal 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 should be included in the Dossier.
  - 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 review committee Evaluation Letters and internal, (if applicable), and external review letters after the review.

The Primary Review Committee will select external reviewers and solicit review letters.

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

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

The Extension Review Committee shall be composed only of tenured faculty and when possible the majority of committee members will hold the rank of full professor. The committee shall have at least 25% female and/or minority representation. The committee will include five members. Three of the faculty representatives, one from each Extension region, will be nominated and elected by peers in their respective Regions from faculty not being considered for promotion or tenure. Regional faculty representatives will serve three-year staggered terms, with a faculty member from one region being elected each year on a rotating basis. The Director of Extension will appoint one member to represent the Montana 4-H Center for Youth Development and one at-large member; these appointments are one-year terms.

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

Executive Director of Extension

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

The Extension Representative to URTPC will be nominated and elected from among the population of tenured Extension Field Faculty.

### **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 criteria and standards in the areas of Scholarship, Teaching, and Service to demonstrate meeting the standards for retention, tenure, or promotion, as applicable. This statement should also include a description of the candidate's area of integration.
4. Separate self-evaluations for teaching, scholarship, service, and integration summarizing the evidence demonstrating that the candidate meet 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 impact/outcome data defined as clientele knowledge gain, attitude change, behavior change, or adoption of best practices.
6. Comprehensive list of developed curriculum and other educational materials. This may include refereed journal articles, articles in popular press, media presentations, and websites.
7. Comprehensive list of service activities related to 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**

It is an expectation that Extension faculty actively collaborate with peers and others. The candidate's role in all collaborative scholarly activities and products during the review period must be defined accurately in terms of the candidate's contributions.

Example: Jane Doe, John Black, and Judy White collaborated to produce a noxious weed field tour. Doe and Black were primarily responsible for organizing and marshalling appropriate resources. 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 three internal peer reviews. Internal peer reviewers must be faculty members of Extension either as field faculty or from academic departments with Extension appointments. The candidate will submit a list of three possible peer reviewers to the RDH; the RDH will select one peer reviewer from the candidate's list and will select two other peer reviewers that were not on the candidate's list.

The internal peer reviewers will review the entire dossier. They will be asked to provide a letter that will include their assessment of the dossier, an in-depth assessment of teaching, and an assessment of the candidate's performance relative to the performance indicators.

Dossiers for tenure and promotion review will include four external peer reviews. External peer reviewers must be faculty members of a higher rank in other Extension systems. The regional review committee will select four external peer reviewers and provide the list to the RDH. The external peer reviewers will be provided the departmental Role and Scope Document and will review the entire dossier. They will be asked to provide a letter that will include their overall assessment relative to the enumerated performance indicators.

## **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.

**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 the primary review committee

**Section 7.03 Promotion to Professor Review** – The faculty member 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.

## **Article VIII Retention Reviews**



**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 Tenure Review Period policy.

**Section 8.02 University Standard.** 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.

### **Section 8.03 Performance Indicators and Weighting**

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.

#### **Teaching**

Candidates for retention meet the standard of effectiveness in teaching by documenting educational efforts that are identified as having significant value to participants.

Indicators given the greatest weight are:

- Group instruction, through workshops, seminars, and classes that are based on identifiable needs.
- One-on-one instruction through personal visits, telephone conferences, and other contacts with constituents that address serious issues directly related to the health, economic well-being, sustainability, or community vitality.
- Fostering of clientele learning by making educational programs more accessible to all clientele, or creating environments where learning is enhanced.

Indicators given lesser value are:

- Delivery or facilitation of Extension learning taught by others

#### **Scholarship**

Candidates for retention meet the standards of effectiveness in teaching by documenting scholarship efforts that identify local needs, lead to effective program development and management, and effectively evaluate program outcomes.

Indicators given the greatest weight are:

- Demonstrated engagement of individuals, groups, and communities in identifying issues and program needs
- Organization, development, management, and evaluation of Extension programs
- Curriculum or Program development

Indicators given lesser value are:

- Design and development of instructional materials
- Support, guidance, and facilitation of clientele groups

### **Service**

Candidates for retention meet the standards of effectiveness in service by documenting evidence of consistent participation and service to local, regional, and statewide groups.

- Membership, participation, and leadership roles in local groups, boards, and committees.
- Membership, participation, and leadership roles in college and regional groups.
- Membership, participation, and leadership roles in professional groups
- Contribution to community
- Contribution to college and region
- Contribution to profession

### **Integration**

Candidates for retention meet the standard for effectiveness in integration by documenting integration of no less than two of the following during the review timeframe: teaching, scholarship, and service.

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

### **Teaching**

To demonstrate effectiveness in teaching, candidates for retention must demonstrate a series of instructional opportunities focused on local needs and provide value to their local clientele. It is recognized that across the state of Montana exists a wide variety of clientele, needs, and appropriate instructional methods. It is also recognized that peers in the Extension system are best equipped to evaluate the effectiveness of educational efforts.

Candidates for retention will submit 5 RDH approved course instructor evaluations for each full year of employment and prorated appropriately for partial years. For example an agent who has been employed for 1 and ½ years will be expected to submit at least 8 evaluations. For the purpose of this expectation, only evaluation forms approved by the RDH will be accepted.

It is also expected that agents will offer other educational opportunities that are taught by others. Agents will also collaborate with other agents to provide education regionally and statewide. It is again recognized that it is impossible to specify a quantity of teaching events, but that Extension peers are well equipped to evaluate the effectiveness of said education.

### **Scholarship**

To demonstrate effectiveness in scholarship, candidates must present a series of evidence that indicates that they have become familiar with the clientele and demographics in their community and are leveraging that knowledge to design and implement appropriate programming. They

must also present evidence that program evaluation data is or will be used to enhance future programming efforts.

### **Service**

To demonstrate effectiveness in service, candidates must present a series of evidence that indicates that they have engaged in their community, region, and college.

### **Integration**

To demonstrate effectiveness in integration, candidates must present evidence of current or planned integration of no less than two of the following areas during the review timeframe: teaching, scholarship, and service.

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

### **Teaching**

- Summaries of Course evaluations.
- Comprehensive list of courses taught and facilitated
- Comprehensive list of articles, Extension publications, website contributions and other media contributions where the agent has used those opportunities to impart knowledge to others
- Summary of developed curriculum and instructional materials
- List of awards or other honors related to teaching efforts
- Peer review of educational materials

### **Scholarship**

- A summary of community engagement activities with local boards and committees and how information learned in those settings has been leveraged to inform program planning.
- A summary of program evaluation information including impacts and outcomes and how that information is used to inform program planning.
- Summary of grants received intended to enhance programming efforts.
- Summary of professional development activities.

### **Service**

- Documentation of participation in civic and community organizations.
- Documentation of public service activities related to the discipline including professional associations.
- Documentation of service and/or leadership on local, regional, Extension, University, multi-state, national, or international committees.

### **Integration**

- The candidate will prepare a statement of integration as part of the personal statement submitted with the dossier and provide supporting evidence in accordance with the requisite standards.

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

Scholarly products that have been submitted but not yet accepted or approved will be considered.

## **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 Extending Tenure Review Period policy.

### **Section 9.02 University Standard**

The University standards for the award of tenure are:

- a) sustained effectiveness in teaching 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) accomplishment in scholarship.

### **Section 9.03 Performance Indicators and Weighting**

#### **Teaching**

Candidates for tenure meet the standard of effectiveness in teaching by documenting educational efforts that are identified as having significant value to participants. See section 8.03 for additional information.

#### **Scholarship**

Candidates for tenure meet the standards of accomplishment in teaching by documenting scholarship efforts that identify local needs, lead to effective program development and management, and effectively evaluate program outcomes. See section 8.03 for additional information.

#### **Service**

Candidates for tenure meet the standards of effectiveness in service by documenting evidence of consistent participation and service to local, regional, and statewide groups. See section 8.03 for additional information.

#### **Integration**

Candidates for tenure meet the standard for effectiveness in integration by documenting integration of no less than two of the following during the review timeframe: teaching, scholarship, and service.

#### **Section 9.04 Quantitative and qualitative expectations**

##### **Teaching**

Please see section 8.04.

In addition, it is expected that educational efforts will be of higher quality and more focused on specific community needs than for retention.

##### **Scholarship, Service, and Integration**

Please see section 8.04

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

Please see section 8.05

#### **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**

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

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

##### **Section 11.02 University Standard**

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

- a) sustained effectiveness in teaching and service during the review period, and
- b) sustained integration of no less than two of the following areas during the review period:

- teaching, scholarship, and service, and
- c) excellence in scholarship.

### **Section 11.03**

#### **Teaching**

Candidates for tenure meet the standard of sustained effectiveness in teaching by documenting educational efforts that are identified as having significant value to participants. See section 8.03 for additional information.

#### **Scholarship**

Candidates for tenure meet the standards of excellence in teaching by documenting scholarship efforts that identify local needs, lead to effective program development and management, and effectively evaluate program outcomes. See section 8.03 for additional information.

#### **Service**

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. See section 8.03 for additional information.

#### **Integration**

Candidates for tenure meet the standard for sustained integration by documenting integration of no less than two of the following during the review timeframe: teaching, scholarship, and service.

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

#### **Teaching**

Please see section 8.04 and 9.04

In addition it is expected that educational efforts will be characterized by exceptional clientele satisfaction and substantial recognition by peers.

#### **Scholarship**

Please see sections 8.04 and 9.04

In addition it is expected that scholarship efforts when paired with teaching will result in substantial positive impacts and outcomes for Extension clientele. Scholarship will also receive substantial recognition from peers as being outstanding.

## **Service**

Please see section 8.04

## **Integration**

Please see section 8.04

## **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 on an annual basis. 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 UPTC committee to consider proposed changes and make recommendations. Approval of changes will follow the procedures outlined in the Faculty Handbook.

## **Article XIII Approval Process**

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

- a) tenurable faculty and administrator of the primary academic unit;
- b) promotion and tenure review committee and administrator of all associated intermediate units (usually colleges);
- c) University, Retention, Tenure and Promotion Committee (URTPC); and
- d) provost.

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

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

### **Section 13.03 University Role and Scope Document**

- a) University Promotion and Tenure Committee (UPTC);
- b) Faculty Senate;
- c) Deans' Council; and
- d) provost.

