

School of Accounting
Evaluation and Procedures
Approved: 2024

School of Accounting Procedures for Faculty Evaluation, Promotion, and Tenure

James Madison University

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1 Composition and Procedures of the AUPAC

1.1 Composition

Except for the Academic Unit Head (AUH), the Academic Unit Personnel Advisory Committee (AUPAC) shall comprise all tenured faculty members, Senior Lecturers, and Principal Lecturers in the School of Accounting.

1.2 Procedures

1.2.1 Chair Selection

- 1.2.1.1 Candidates for the AUPAC Chair will be nominated by faculty (including self-nominations).
- 1.2.1.2 The AUPAC chair must be a tenured faculty member in the School of Accounting.
- 1.2.1.3 Before the conclusion of the first week of classes, but after the start of the academic year (which starts two weeks before the first day of class), AUPAC members, including those nominated, shall elect the new AUPAC chair by majority confidential vote. This vote shall be tabulated independently by the outgoing AUPAC chair and a volunteer from the AUPAC who is not seeking the position. If the current AUPAC chair is among those nominated, they will delegate the tabulation of voting to another member who is not nominated.

1.2.2 Subcommittees

- 1.2.2.1 There are two subcommittees of the AUPAC: The Tenured and Tenure Subcommittee and the Lecturer Subcommittee.
- 1.2.2.2 The Tenured and Tenure subcommittee comprises all tenured faculty members except the AUH. It is responsible for the AUPAC's recommendations on all matters related to the tenure and promotion of tenured and tenure-track faculty.
- 1.2.2.3 The Lecturer Subcommittee shall consist of tenured members of the School of Accounting and all RTA faculty who are senior lecturers or principal lecturers. The Lecturer Subcommittee is responsible for the AUPAC's recommendations on all matters related to the promotion of lecturers.
- 1.2.2.4 The AUPAC Chair serves as Chair of both the Tenured and Tenure Subcommittee and the Lecturer Subcommittee.

1.2.3 Voting, Participation, and Deliberation

- 1.2.3.1 AUPAC members on academic leave or otherwise unable to be physically present in AUPAC deliberations may participate and vote via a mutually agreed upon alternative method.

- 1.2.3.2 All AUPAC deliberations will be held in the strictest of confidence. Failure to maintain confidentiality may be grounds for removal from the AUPAC or a misconduct charge. (Faculty Handbook, Sections III.E.2.b. and III.A.25.).
- 1.2.3.3 Individuals not part of the AUPAC may participate in the meetings at the AUPAC's discretion.
- 1.2.3.4 Voting for promotion and tenure decisions and resolving evaluation appeals will be decided by a majority confidential vote.
- 1.2.3.5 A quorum for the AUPAC and its Subcommittees shall be 60% of members not currently on academic leave.

1.2.4 Governing Document Revisions

- 1.2.4.1 Revisions to this document may be proposed to the AUPAC by any full-time faculty member in the School of Accounting, including the AUH, by November 15 each year. Revisions to Appendix A School of Accounting Publication Categories require a majority vote of the AUPAC.
- 1.2.4.2 Proposed amendments to this document shall be distributed to the faculty by February 1.
- 1.2.4.3 The AUPAC will invite all faculty members to a meeting to comment upon all proposed amendments. After the faculty has had at least a week to review the changes, the AUPAC will schedule a meeting to discuss the proposed amendments.
- 1.2.4.4 After deliberating on the proposed amendments, the AUPAC will provide a proposed amended document no later than March 15. The AUPAC Chair will arrange a confidential vote of all full-time faculty (except the AUH) in the School of Accounting to take place over at least one week, with the votes being tallied on a pre-specified date no later than April 1. A majority of the full-time faculty members (except the AUH) in the School of Accounting must approve the amendments.
- 1.2.4.5 Once approved, the AUPAC chair will present the proposed document to the AUH by April 5. The AUH must notify the faculty by April 15 of the approval or disapproval of the proposed changes.
- 1.2.4.6 If approved by the AUH, the AUPAC chair will send the proposed document to the dean for approval. The AUPAC chair must report to the AUPAC every three months on the document's status until approved or disapproved. All approved revisions will be effective at the beginning of the next academic year.

- 1.2.4.7 Minor technical corrections to this document are defined as follows: alignment with required due dates because of changes in the Faculty Handbook and corrections due to spelling, grammar, typographical, and math errors. If the proposed changes to the document involve only minor technical corrections, and unless a faculty member disagrees with the changes and wishes a faculty meeting to deliberate the proposal, a faculty meeting is not required.
- 1.2.4.8 If the AUH disapproves of the proposed changes, the AUPAC Chair may request the College of Business Dean to resolve the differences between the parties by April 20.
- 1.2.4.9 Governing document for tenure and promotion evaluations:
- Candidates for promotion to senior lecturer will be reviewed under the criteria and procedures outlined in the governing document in effect upon the initial implementation of the RTA ladder track or, for those hired after the implementation, the governing document in effect at the time of hire. At the candidate's election, the criteria and procedures of a subsequent governing document may be applied.
 - Candidates for promotion to principal lecturer will be reviewed under the criteria and procedures in effect when they were granted promotion to senior lecturer. At the candidate's election, the criteria and procedures of a subsequent governing document may be applied.
 - Candidates for tenure and promotion to associate professor or tenure as an associate professor will be reviewed under the criteria and procedures outlined in the governing document in effect at the time of hire. At the candidate's election, the criteria and procedures of a subsequent governing document may be applied.
 - Candidates for promotion to full professor will be reviewed according to the criteria and procedures outlined in the governing document in effect when they were granted tenure as associate professors or hired as associate professors with tenure. At the candidate's election, the criteria and procedures of a subsequent governing document may be applied.

2 Responsibilities

2.1 Candidate for Interim Review or Promotion and/or Tenure

- 2.1.1.1 Tenure-track faculty will be evaluated by the AUPAC during their third year (or as otherwise specified in their contracts) and when they apply for promotion and/or tenure (P&T). Lecturers and renewable-term appointment (RTA) faculty will be evaluated during their third year and when they apply for promotion.
- 2.1.1.2 Faculty candidates for interim review or promotion and/or tenure must submit a dossier according to the guidelines specified in this document to the Academic Unit Head (AUH) and the AUPAC Chair. Candidates for promotion and/or tenure must submit the dossier by October 1. Candidates for interim reviews must submit the dossier by April 1.

2.2 AUPAC

- 2.2.1.1 The appropriate subcommittee (Tenured and Tenure, or Lecturer) of the AUPAC shall evaluate a faculty member for promotion and/or tenure, interim evaluation of untenured and instructional faculty, and hear any appeal of annual evaluations.
- 2.2.1.2 When evaluating a faculty member for promotion and/or tenure and interim evaluations of untenured and instructional faculty, the AUPAC shall consider annual evaluations, written and quantitative student evaluations, relevant documents in the faculty member's personnel file, and any aspect of a faculty member's conduct that affects performance positively or negatively (Handbook III.E.2.b.). The AUPAC shall evaluate the candidate's performance as excellent, satisfactory, or unsatisfactory in teaching, research (scholarly accomplishments/professional qualifications in the case of lecturers), and service. The AUPAC shall consider each candidate for tenure and/or promotion and render a recommendation by November 15. For interim evaluations, the AUPAC shall render a recommendation by April 25. The AUPAC chair will send a copy of the AUPAC recommendations to the candidate, AUH, and dean.
- 2.2.1.3 When hearing an appeal of an annual evaluation, the AUPAC shall consider the AUH's official written annual evaluation, written and quantitative student evaluations, relevant documents in the School of Accounting's personnel files, and any aspect of a faculty member's conduct that impacts performance positively or negatively.

2.3 AUPAC Chair

- 2.3.1.1 The chair will be responsible for convening meetings and conducting confidential votes by the AUPAC.
- 2.3.1.2 The chair will conduct AUPAC meetings professionally and in a way that facilitates broad participation by the AUPAC members in discussing issues.
- 2.3.1.3 The chair is responsible for promptly circulating all official communications from the AUPAC to voting members for feedback and delivering promotion and tenure or interim review letters in well-sealed envelopes to the candidates. The promotion and/or tenure recommendation must be submitted to the dean by November 15. After the dean has received both the AUPAC and AUH recommendations, the dean will provide a copy of the AUPAC recommendation to the AUH and a copy of the AUH recommendation to the AUPAC.
- 2.3.1.4 The chair is a voting member of the AUPAC.
- 2.3.1.5 The chair may delegate responsibilities to an AUPAC member at their discretion and as necessary.

2.4 AUH

2.4.1 Promotion and/or Tenure

- 2.4.1.1 The AUH shall inform individual faculty and the AUPAC Chair of who will be reviewed for promotion and/or tenure or for whom there is to be an interim evaluation during the next academic year by May 1.
- 2.4.1.2 The AUH shall provide new faculty members with a copy of this document and inform them that they will undergo an evaluation during their first and third years (or as otherwise provided in their contract).
- 2.4.1.3 The AUH shall facilitate the gathering of information by the AUPAC at the request of the AUPAC Chair.
- 2.4.1.4 The AUH shall consider each candidate for tenure and/or promotion and render a written recommendation by November 15 to the dean along with a copy of the recommendation to the faculty member. After the dean has received both the AUPAC and AUH recommendations, the dean will provide a copy of the AUPAC recommendation to the AUH and a copy of the AUH recommendation to the AUPAC.

2.4.2 *Annual Evaluations*

- 2.4.2.1 The AUH shall provide the annual performance evaluation to the faculty member by October 1. For interim evaluation of lecturers, tenure-track, or RTA faculty, a letter from the AUH will be provided to the candidate, and a copy will be given to the AUPAC Chair no later than May 15. The AUH shall make independent evaluations in accordance with this document based upon, but not be limited to, relevant documents in the faculty member's departmental personnel file and any aspect of a faculty member's conduct that impacts performance positively or negatively. (Handbook III.E.2.b.)
- 2.4.2.2 The AUH shall maintain copies of signed annual evaluations and numeric and written student evaluations in each faculty member's department personnel file. Duplicates of all materials maintained in the department personnel file shall be maintained in an electronic personnel file.

3 Evaluation Procedures: Initial and Interim, Annual, and Promotion and/or Tenure

3.1 Initial and Interim Evaluation Procedures

3.1.1 Initial Evaluation

The AUH shall conduct an initial evaluation at the beginning of a new faculty member's second semester. Any appeal shall be to the AUPAC within one week of receiving the initial evaluation. The AUPAC shall hear the appeal within two weeks of receiving notice of the appeal. The AUPAC shall render its recommendation to the AUH, the dean, and the faculty member within two weeks of its hearing.

3.1.2 Third-Year Review Tenure-Track Faculty

The AUH and AUPAC will evaluate all tenure-track faculty during their third year (or as otherwise specified in their contracts). All tenure-track faculty will submit a dossier of their activities and accomplishments in teaching, scholarly achievement and professional qualifications, and professional service by April 1 of their third academic year for consideration by the AUPAC. A dossier should include a curriculum vitae and a ten-page or less summary highlighting activities and accomplishments during the three years, plus documentation supporting the summary. The dossier shall be provided to the AUH and the AUPAC Chair in either electronic or paper form as specified by the AUH and the AUPAC. The AUPAC may request additional information necessary to evaluate the faculty member.

3.1.3 Third-Year Review Lecturer Faculty

All Lecturer faculty will be evaluated by the AUH and AUPAC during their third year (or as otherwise specified in their contracts). Lecturers will submit a summary of their activities and accomplishments in teaching, professional qualifications, and service by April 1 in the year of the review. A dossier should include a curriculum vitae and a ten-page or less summary highlighting activities and accomplishments during the period under review, plus documentation supporting the summary. The dossier shall be provided to the AUH and the AUPAC Chair in either electronic or paper form as specified by the AUH and the AUPAC. The AUPAC may request additional information necessary to evaluate the faculty member.

3.1.4 Nonrenewal of Appointment

Unacceptable performance as determined in the initial evaluation will normally result in nonrenewal of an appointment of an untenured first-year faculty member. If the AUH finds the faculty member's performance unacceptable, AUPAC review of the faculty member's performance is required as specified in the Faculty Handbook, Section III.F.3. The AUPAC review must be completed and sent to the dean within seven days of receiving a recommendation for the nonrenewal of a first-year faculty member from the AUH. See Faculty Handbook, Section III.F.3.c. Notice of nonrenewal shall be in accord with the

deadlines established by the Faculty Handbook. If nonrenewal results from misconduct on the faculty member's part, it shall be handled per university policy that supersedes this document.

3.2 Annual Evaluation Procedures

3.2.1 Period Covered

The AUH shall evaluate each faculty member each year following the requirements set forth by the James Madison University Faculty Handbook. The annual evaluation of scholarship (scholarly accomplishments and professional qualifications for Lecturer faculty) will consider the faculty member's work for the year ended and the previous two years. The annual evaluation of teaching and service will consider the faculty member's work for the year ended. If the faculty member has been at James Madison University for less than three years, the evaluation will be based on work completed since the beginning of employment within the department.

3.2.2 Relative Weights

The relative weights of the three areas of performance used in the year-end evaluation shall be agreed upon by the faculty member and the AUH before the start of the academic year, per the faculty member's contract and COB policy. In the event of unforeseen circumstances, the agreement on weights may be renegotiated during the year. If the faculty member and AUH cannot agree on these weights, they shall present their arguments to the AUPAC. If the AUPAC and AUH cannot agree, they shall present the matter to the dean for final resolution.

3.2.3 Faculty Reporting Format and Deadline

During the academic year, the faculty member shall report activities and information in the three performance areas to the AUH for review and evaluation. The AUH will specify the form of this report and will communicate the deadline for completion of the reporting of the year's activities.

3.2.4 Preliminary Written Evaluation and Conference

A preliminary written evaluation, containing a preliminary overall rating and a rating in each of the three areas, must be given to the faculty member by the AUH at least seven days before an evaluation conference. The evaluation conference must provide an opportunity to discuss the faculty member's performance and the department's needs and requirements as perceived by both the faculty member and the AUH.

3.2.5 Official Written Evaluation

An official written evaluation shall not be made until after the evaluation conference. The official written evaluation is to rate the faculty member as excellent, satisfactory, or unsatisfactory in each of the three areas of performance and an overall performance rating as acceptable or unacceptable (Faculty Handbook, Section III.E). An overall unacceptable rating requires a finding of unsatisfactory in 50% or more of the three performance areas as weighted in the Faculty Activity Plan.

The AUH shall provide the annual evaluation to the faculty member by October 1.

3.2.6 Appeals Process

After consultation with the AUH, the faculty member may submit any appeal of this evaluation in writing to the AUPAC Chair within three days of receiving the annual evaluation. Within seven days of receiving written notice of appeal from a faculty member, the AUPAC shall conduct a review at which the faculty member and/or the AUH may be called to provide additional information. Within seven days of the hearing, the AUPAC shall issue a written recommendation with copies to the faculty member and AUH. Depending on the findings of the AUPAC, the AUPAC chair and AUH will meet to discuss possible modifications to the annual evaluation. If a resolution of the appeal, signed by the faculty member, cannot be achieved within the department, the matter must be submitted by the faculty member to the dean by October 21. If the annual evaluation is provided to the faculty member before October 1, the periods set forth above may be extended by the AUPAC, but in any event, an appeal to the dean must occur by October 21. (Faculty Handbook, Section III.E.4.h).

3.2.7 Relationship to Promotion and Tenure Evaluation

The annual evaluation process is separate from the promotion and tenure evaluation process. A succession of satisfactory annual evaluations in teaching, scholarship, service, or overall performance is a necessary but not sufficient condition that the faculty member's work is satisfactory for tenure or promotion purposes.

3.3 Promotion and/or Tenure Procedures

3.3.1 Notification

The faculty member wishing to be considered for promotion and/or tenure in a given academic year must declare their intention in writing to the AUPAC chair and the AUH by September 1. Early promotion to the rank of Associate or Professor requires that the candidate's performance significantly exceeds the requirements specified in this document for excellent performance in all three performance areas. Faculty members on tenure track who are denied tenure at any point during the probationary period must

remain employed for the duration of the probationary period, but they may not apply for tenure again.

3.3.2 Summary Document

All candidates for promotion and/or tenure should prepare a summary document, not to exceed 25 pages, describing accomplishments in each of the three functional areas over the evaluation period. The candidate shall provide a copy of the summary document to the AUH and the AUPAC chair by October 1.

3.3.3 Dossier and Supporting Materials

In addition to this summary document, supplementary materials, such as a curriculum vitae, copies of publications, course materials, letters from committee chairs describing service performance, and all other material that would be pertinent in evaluating the candidate shall be provided separately and completely by October 1. The supplementary material should have a table of contents. The summary document and copies of all supplementary materials should be provided to the AUH and the AUPAC Chair in either electronic or paper form as specified by the AUH and the AUPAC.

3.4 Tenure and/or Promotion Decisions

3.4.1 Independent Evaluations by AUH and AUPAC

The Academic Unit Head and AUPAC shall make independent evaluations of the facts to include, but not be limited to, relevant documents in the faculty member's departmental personnel file and any aspect of a faculty member's conduct that impacts performance positively or negatively (Handbook III.E.2.b.) and make independent recommendations for promotion and/or tenure based on the criteria outlined in this document. The sharing of facts between the AUH and AUPAC is permitted.

3.4.2 Recommendation Letters AUH and AUPAC

The letters of recommendation by the AUPAC and AUH will rate the candidate as excellent, satisfactory, or unsatisfactory in teaching, scholarly achievements and professional qualifications, and service. The letter will also include a justification for each rating and an overall positive or negative recommendation.

4 Promotion and/or Tenure Criteria and Standards

4.1 Standards

4.1.1 Components

Teaching, scholarly achievement and professional qualifications, and professional service are the bases for evaluating the performance of candidates for promotion in academic rank. The faculty member must be evaluated as excellent, satisfactory, or unsatisfactory in each of these areas. Problems with a faculty member's conduct may disqualify a candidate for promotion in academic rank.

4.1.2 Application

In the evaluation of faculty members for promotion in academic rank, the following standards apply:

4.1.2.1 Senior Lecturer

Promotion to senior lecturer requires five years of service at the rank of lecturer, an excellent teaching rating, and at least satisfactory ratings in the second and third areas.

4.1.2.2 Principal Lecturer

Promotion to principal lecturer requires five years of service as a senior lecturer, excellent ratings in teaching and one other area, and a satisfactory rating in the third.

4.1.2.3 Associate Professor

Promotion to associate professor requires an excellent rating in one area and at least satisfactory ratings in the other areas.

4.1.2.4 Professor

Promotion to professor requires excellent ratings in two areas and a satisfactory rating in the third.

4.2 Teaching

4.2.1 Criteria

Teaching is a multifaceted activity that includes, among other factors, course design and delivery, curriculum development, currency in the subject matter taught, and interaction with students. The evaluator should consider as many criteria and sources of information as practicable and broadly view the activities that constitute effective teaching.

4.2.2 Standards

4.2.2.1 Satisfactory Teaching

Satisfactory teaching requires effectively meeting the following standards:

Pedagogy

- Stimulating student learning and interest in the subject matter
- Providing instruction at a level of rigor appropriate to the subject matter
- Meeting course learning outcomes

Organization

- Being well-prepared for class
- Informing students of course objectives, assignments, and examination procedures
- Conducting the class in a well-organized manner
- Communicating the subject matter clearly

Interaction with students

- Maintaining scheduled office hours
- Providing career advising to students

Evaluation

- Maintaining fair and impartial grading standards
- Providing timely feedback on progress

Curriculum and course content

- Staying current with the subject matter of courses taught
- Participating in department activities to assess and update the curriculum

None of these indicators, in and of themselves, is either necessary or sufficient evidence of satisfactory teaching performance. The faculty member shall provide evidence, including supporting documentation, demonstrating satisfactory teaching.

4.2.2.2 Excellent Teaching

An excellent teaching rating requires fulfilling the criteria for satisfactory teaching performance in an exemplary manner. Additionally, evidence of a strong, sustained commitment to teaching is expected. The AUH and the AUPAC will use discretion to make a final determination of excellence in teaching. To be considered for an excellent rating in teaching, the faculty member must provide evidence, including supporting documentation, demonstrating that the faculty member has exceeded departmental expectations for satisfactory teaching. Some indicators of excellent teaching include:

- development of innovative pedagogical methods and materials,
- development of new courses,

- major revision of existing courses,
- serving as chair of a student's honors thesis committee,
- teaching awards,
- outstanding student evaluations,
- unsolicited testimonials from former students and employers,
- invited evaluations of classroom performance by the AUH or AUPAC and
- publication of widely adopted and/or acclaimed instructional materials.

There are many paths to the achievement of an excellent rating in teaching. None of these indicators, in and of themselves, is either necessary or sufficient evidence of excellent teaching performance. The faculty member may provide evidence, including supporting documentation, to demonstrate excellent teaching.

4.3 Scholarly Achievement Tenured and Tenure-Track Faculty

4.3.1 Criteria

The following paragraphs reflect the broad dimensions of research/scholarly accomplishments and intellectual contributions as defined by the AACSB.

- Basic or discovery scholarship (often referred to as discipline-based scholarship) that generates and communicates new knowledge and understanding and/or development of new methods. Intellectual contributions in this category are normally intended to impact the theory, knowledge, and/or practice of business and management.
- Applied or integration/application scholarship that synthesizes new understandings or interpretations of knowledge or technology; develops new technologies, processes, tools, or uses; and/or refines, develops, or advances new methods based on existing knowledge. Intellectual contributions in this category are normally intended to contribute to and impact the practice of business and management.
- Teaching and learning scholarship that develops and advances new understandings, insights, and teaching content and methods that impact learning behavior. Intellectual contributions in this category are normally intended to impact the teaching and/or pedagogy of business and management.

There are additional activities and accomplishments that do not fall neatly into one of the three categories listed above. These include, but are not limited to, research grants, membership on editorial boards, ad hoc reviews, participation as a discussant at professional meetings, professional certification, and other professional awards. In addition, these three areas of contribution are not synonymous with the publications

categories designated A or B or B-Level equivalency elsewhere in this document (e.g., it is possible to have a B-Level achievement in basic research, applied research, or instructional development).

Faculty members must meet the minimum standards for satisfactory research to be considered for tenure and/or promotion. Research counted towards tenure and/or promotion includes works published while employed at JMU. Faculty who are hired at JMU and have been given credit toward tenure shall submit works published at JMU and works published during the credited period.

4.3.2 Standards

The minimum requirement for a satisfactory evaluation in the area of research/scholarly accomplishments for promotion to the rank of Associate Professor and/or the granting of tenure in the College of Business is the following:

A minimum of four peer-reviewed publications listing the author (candidate) as a JMU faculty member from the program's B list plus evidence of sustained and ongoing scholarly effort, and meet the AACSB qualification as a SA faculty member.

Each candidate seeking promotion to the rank of Associate Professor and/or the granting of tenure may substitute one item from the program's B equivalency list for one of the four peer reviewed publications.

The minimum requirement for a satisfactory evaluation in the area of research/scholarly accomplishments for promotion to the rank of professor is the following:

A minimum of seven peer-reviewed publications from the program's B list plus evidence of a sustained record of accomplishment while holding the position of Associate Professor, ongoing scholarly effort, and meet the AACSB qualification as a SA faculty member.

Each candidate seeking promotion to rank of professor may substitute one item from the program's B equivalency list for one of the three peer-reviewed publications required since the promotion to Associate Professor.

Excellent Scholarship: The minimum requirement for an excellent evaluation in the area of research/scholarly accomplishments for promotion to the rank of Associate Professor and/or the granting of tenure in the College of Business is the following:

A minimum of six peer-reviewed publications listing the author (candidate) as a JMU faculty member from the program's B list plus evidence of sustained and ongoing scholarly effort, and meet the AACSB qualification as a SA faculty member.

Each candidate seeking promotion to rank of associate professor and/or tenure may substitute one item from the program's B equivalency list for one of the six peer-reviewed publications.

The minimum requirement for an excellent evaluation in the area of research/scholarly accomplishments for promotion to the rank of professor is the following:

A minimum of eleven peer-reviewed publications from the program's B list plus evidence of a sustained record of accomplishment while holding the position of Associate Professor, ongoing scholarly effort, and meet the AACSB qualification as a SA faculty member.

Each candidate seeking promotion to the rank of professor may substitute one item from the Program's B equivalency list for one of the four peer-reviewed publications required since promotion to Associate Professor.

None of these requirements, in and of themselves, are evidence of satisfactory or excellent scholarship. It is the responsibility of the faculty member to provide information that documents and demonstrates his/her satisfactory or excellent scholarship.

The School of Accounting's current list of A, B and C publications and equivalencies is presented in Appendix A.

4.4 Scholarly Achievement/Professional Qualifications Lecturer Faculty

4.4.1 Criteria

The following is a non-exhaustive list of activities in scholarly achievement and professional qualifications as stipulated by the COB Faculty Qualification Guidelines.

- Peer-reviewed quality publications
- Other publications (e.g. case study, textbook supplement, etc.)
- Continuing education and certifications
- Consulting activities
- Service on a board or other oversight positions
- Recognized professional expertise in teaching discipline
- University administrative duties

Most items on this list are worth one point, except for peer-reviewed faculty publications (3 points), other publications (2 points), and other activities at the review committee's discretion. For additional information on the list, see Appendix B.

4.4.2 Standards

Excellent Scholarly Achievement and Professional Qualifications

For promotion from Lecturer to Senior Lecturer, or from Senior Lecturer to Principal Lecturer, excellent scholarly achievement and professional qualifications requires that the faculty have at least ten points from at least two of the six categories listed in Appendix B plus evidence of sustained and ongoing effort in this area in the past five years.

Satisfactory Scholarly Achievement and Professional Qualifications

For promotion from Lecturer to Senior Lecturer, or from Senior Lecturer to Principal Lecturer, satisfactory scholarly achievement and professional qualifications requires that the faculty have at least six points from at least two of the six categories listed in Appendix B plus evidence of sustained and ongoing effort in this area in the past five years.

Unsatisfactory Scholarly Achievement and Professional Qualifications

Unsatisfactory scholarly achievement and professional qualifications consist of that which does not meet the above standards for satisfactory or excellent scholarly achievement and professional qualifications.

4.5 Service

4.5.1 Criteria

There are three levels of service.

4.5.1.1 Level 1

Level 1 service is defined primarily as activities that involve a very significant time commitment. Secondary indicators of Level 1 service are 1) a high level of personal responsibility; 2) involvement in activities that are critical to the mission of the program, college, university, or professional organization; 3) distinguishing oneself in a leadership role, whether elected or appointed; 4) serving, with distinction, one's profession and/or the external community in a role that exploits one's professional knowledge, skills, and talents; 5) "making a difference" in those areas in which one has chosen to serve; and 6) being widely recognized as one who has an exemplary attitude towards service commitments and who serves as a role model for other faculty. Level 1 service should not be interpreted as requiring the presence of each and every secondary indicator of excellent performance. In particular, Level 1 service does not require a leadership role (e.g., chair of a major committee). However, in all cases there should be evidence of a substantial contribution and an active role.

Examples of Level 1 service include:

- chair of an important recruiting committee
- major responsibility for significant curriculum reform
- Speaker of Faculty Senate
- Chair of AACSB or SACS re-accreditation efforts or other important university committee
- faculty advisor to an active, successful student organization
- high level office in a prestigious regional or national organization involving a significant time commitment

4.5.1.2 Level 2

Level 2 service is defined as important activities in support of one's program, the college, the university, or the profession that involve a moderate to significant time commitment. It is anticipated that the bulk of one's service activities will fall into this category.

Examples of Level 2 service activities include:

- contributing member of program, college, or university committees, or Faculty Senate
- proceedings editor for a regional conference, book review editor for a journal or program/track chair for a regional conference
- active participation in curriculum development
- active participation in university-sponsored programs, such as the minority mentor program and athletic recruiting

4.5.1.3 Level 3

Level 3 service is defined as participation in program, college, and university events for which faculty visibility is important.

Examples of Level 3 service include:

- having lunch with potential employers of COB students or freshmen parents
- attending graduation ceremonies, COB Parent's Day Open House, COB awards ceremonies, program meetings or program seminars
- participating in faculty recruiting (meeting with candidates, attending candidate seminars)

4.5.2 Standards

It is the responsibility of the faculty member to provide information that fully documents and demonstrates each service contribution. Faculty may reclassify service contributions from those levels provided in the examples above but must provide substantial evidence for the reclassification. Faculty members may supply written comments from committee chairs as part of the evaluation documentation. If the faculty member serves as the chair of a committee, the faculty member may ask the individual making the appointment to supply evidence of performance. In cases where service performance is judged unsatisfactory, no credit for that activity shall be given towards promotion and/or tenure.

4.5.2.1 Excellent Service

There are many acceptable paths to an excellent evaluation in the area of service. In general, excellent service is defined as professionally, effectively, and reliably assuming the tasks required to support the mission of one's program, the department, college, university, and where appropriate a significant contribution to one's profession and/or the external community.

4.5.2.2 Satisfactory Service

Satisfactory service is participation in activities that are basic to the responsibilities of a faculty member. These include: taking an active role in programmatic efforts such as those set forth above as Level 3 service; seeking opportunities to serve by volunteering to sit on program, department, college and university committees and providing timely delivery of required commitments.

There are many acceptable paths to a satisfactory evaluation in the area of service. In general, satisfactory service is effectively and reliably assuming the tasks required to support the operation of the program, department, college, university and, where appropriate, contributing to one's profession and/or the external community.

4.6 Early Promotion and Tenure or Promotion

Normally, a faculty member should have completed five years in academic rank before being reviewed for promotion, Early promotion to the rank of Associate or Professor requires that the candidate's performance significantly exceeds the requirements specified in this document for excellent performance in all three performance areas.

5 Annual Evaluation Guidelines

5.1 Overall Performance Rating

Based on the criteria stated herein a faculty member is to be rated as excellent, satisfactory, or unsatisfactory in each of the three areas of performance: teaching, scholarship, and service and an overall performance rating as acceptable or unacceptable (Faculty Handbook, Section III.E). An overall unacceptable rating the finding of unsatisfactory in 50% or more of the three performance areas as weighted in the Faculty Activity Plan.

5.2 Teaching

Teaching is a multifaceted activity including among other factors, course design and delivery, curriculum development, currency in the subject matter taught and interaction with students. The annual evaluation is to consider as many criteria and sources of information as practicable and is to take a broad view of the activities that constitute effective teaching. Evaluation of teaching will generally be based on the current year's performance however, in cases such as the development of a new course, where the effort is over multiple years, such activity shall be considered in multiple evaluation periods.

5.2.1 Satisfactory Teaching

Satisfactory teaching is defined as effectively meeting the following standards:

Pedagogy

- stimulating student learning and interest in the subject matter,
- providing instruction at a level of rigor appropriate to the subject matter,
- meeting course learning outcomes.

Organization

- being well prepared for class,
- informing students of course objectives, assignments, and examination procedures,
- conducting the class in a well-organized manner, and
- communicating the subject matter clearly.

Interaction with students

- maintaining scheduled office hours,
- providing career advising to students.

Evaluation

- maintaining fair and impartial grading standards,
- providing timely feedback on progress.

Curriculum and course content

- staying current with the subject matter of courses taught,
- participation in department activities to assess and update the curriculum.

None of these indicators, in and of themselves, is either necessary or sufficient evidence of satisfactory teaching performance. The faculty member may provide evidence, include supporting documentation, demonstrating satisfactory teaching.

5.2.2 Excellent Teaching

Fulfillment of the criteria for satisfactory teaching performance in an exemplary manner is required for an excellent rating in teaching. Additionally, evidence of a strong, sustained commitment to teaching is expected. The AUH will use discretion in making a final determination of excellence in teaching. To be considered for an excellent rating in teaching, the faculty member must provide evidence, including supporting documentation, demonstrating that the faculty member has exceeded departmental expectations for satisfactory teaching. Some indicators of excellent teaching include:

- development of innovative pedagogical methods and materials,
- development of new courses,
- major revision of existing courses,
- serving as chair of a student's honors thesis committee,
- teaching awards,
- outstanding student evaluations,
- unsolicited testimonials from former students and employers,
- invited evaluations of classroom performance by the AUH or AUPAC, and
- publication of widely-adopted and/or acclaimed instructional materials.

There are many paths to the achievement of an excellent rating in teaching. None of these indicators, in and of themselves, is either necessary or sufficient evidence of excellent teaching performance. The faculty member may provide evidence, include supporting documentation, demonstrating excellent teaching.

5.2.3 *Unsatisfactory Teaching*

Unsatisfactory teaching consists of any combination of teaching activities that do not meet the standards for satisfactory or excellent teaching above.

5.3 **Scholarly Achievement and Professional Qualifications**

5.3.1 *Tenured and Tenure-Track Faculty*

For all tenured and tenure-track faculty members at JMU for at least three years, annual evaluations for scholarly activity will be based on performance during a rolling three-year period, including the evaluation year and the prior two years. Performance will be evaluated based on criteria consistent with requirements for promotion and tenure. Evidence of ongoing and scholarly effort includes all scholarly activities listed in 4.3.1, plus articles submitted to journals in the review process and the development of an ongoing stream of research. Faculty members at JMU for less than three years will be evaluated based on their progression toward tenure and promotion for that period.

5.3.2 *Scholarly Achievement/Professional Qualifications Lecturer Faculty*

5.3.2.1 Criteria

The following is a non-exhaustive list of activities in scholarly achievement and professional qualifications as stipulated by the COB Faculty Qualification Guidelines:

- Peer-reviewed quality publications
- Other publications (e.g. case study, textbook supplement, etc.)
- Continuing education and certifications
- Consulting activities
- Service on a board or other oversight positions
- Recognized professional expertise in teaching discipline
- University administrative duties

Most items on this list are worth one point, except for peer-reviewed faculty publications (3 points), other publications (2 points), and other activities at the review committee's discretion. For additional information on the list, see Appendix B.

5.3.2.2 Standards

Excellent: Excellent scholarly achievement and professional qualifications require that RTA faculty have at least two points in two different areas plus evidence of sustained and ongoing effort in this area in the past three years.

Satisfactory: Satisfactory scholarly achievement and professional qualifications require that faculty have at least one point plus evidence of sustained and ongoing effort in this area in the past three years.

Unsatisfactory: Unsatisfactory scholarly achievement and professional qualifications consist of that which does not meet the standards for satisfactory or excellent scholarship.

5.4 Service

5.4.1 Criteria

5.4.1.1 Level 1

Level 1 service is defined primarily as activity that involves a significant time commitment.

Secondary indicators of Level 1 service are 1) a high level of personal responsibility; 2) involvement in activities that are critical to the mission of the program, college, university, or professional organization; 3) distinguishing oneself in a leadership role, whether elected or appointed; 4) serving, with distinction, one's profession and/or the external community in a role that exploits one's professional knowledge, skills, and talents; 5) "making a difference" in those areas in which one has chosen to serve; 6) being widely recognized as one who has an exemplary attitude towards service commitments and who serves as a role model for other faculty. Level 1 service does not require the presence of each secondary indicator of excellent performance. In all cases there should be evidence of a substantial contribution and an active role. Examples of Level 1 service include:

- chair of a recruiting committee,
- major responsibility for significant curriculum reform,
- Speaker of Faculty Senate,
- Chair of AACSB or SACS re-accreditation efforts or other important university committee,
- program/track chair for a regional conference,
- Chair of a program review committee,
- faculty advisor to an active, successful student organization,
- high-level office and or responsibility in a prestigious regional or national organization.

5.4.1.2 Level 2

Level 2 service is defined as important activities in support of one's program, the department, college, university, or the profession that involve a moderate to significant time commitment. It is anticipated that most of a faculty member's service activities will fall into this category.

Examples of Level 2 service activities include:

- member of program, college, university committee, or Faculty Senate,
- proceedings editor for a regional conference, book review editor for a journal or active participation in curriculum development,
- participation in university-sponsored programs,
- program committee member of a regional conference,
- actively engaging the industry in program activities.

5.4.1.3 Level 3

Level 3 service is defined as participation in program, department, college, and university events for which faculty visibility is important. Generally, level three service does not require additional effort before or after.

Examples of Level 3 service include:

- attending department/program meetings.
- attending graduation ceremonies, COB Parent's Day Open House, COB awards ceremonies
- participating in any program assessment efforts requiring universal faculty involvement
- having lunch with potential employers of COB students or freshmen parents
- participating in faculty recruiting (meeting with candidates, attending candidate seminars)
- attending the JMU career fair or Internship fair

5.4.2 Standards

5.4.2.1 Excellent Service

There are many acceptable paths to an excellent evaluation in the area of service. In general, excellent service is defined as professionally, effectively, and reliably assuming "significantly more than the tasks required to support the mission of one's program, the department, college, university, and where appropriate a significant contribution to one's profession and/or the external community.

5.4.2.2 Satisfactory Service

Satisfactory service is participation in activities that are basic to the responsibilities of a faculty member. These include: taking an active role in programmatic efforts such as those set forth above as Level 3 service; seeking opportunities to serve by volunteering to sit on program, department, college and university committees and providing timely delivery of required commitments.

There are many acceptable paths to a satisfactory evaluation in the area of service. In general, satisfactory service is effectively and reliably assuming the tasks required to support the operation of the program, department, college, university and, where appropriate, contributing to one's profession and/or the external community. The faculty member's annual plan, as negotiated with and approved by the AUH, must include projected service that is at least satisfactory.

5.4.2.3 Unsatisfactory Service

Unsatisfactory service consists of any combination of service activities that do not meet the standards for satisfactory or excellent service above.

5.4.2.4 Evaluating Service Contributions

It is the responsibility of the faculty member to provide information that fully-documents and demonstrates each service activity as being level one, two or three. Faculty may reclassify service contributions from those levels provided in the examples above but must provide substantial evidence for the reclassification. Faculty members may supply written comments from committee chairs as part of the evaluation documentation. If the faculty member serves as the chair of a committee, the faculty member may ask the individual making the appointment to supply evidence of performance. In cases where service performance is judged unsatisfactory, no credit for that activity shall be given.

5.5 Merit Based Salary Increases

Merit-based salary increases are to be based on the annual evaluations spanning the last three years or the period since the last merit raises were granted, whichever is longer. The AUH will assign points based on the annual evaluations. Once points are assigned for each annual period, scores are computed for each faculty member, and the faculty members in the academic unit are then ranked accordingly to determine the merit allocation. Unless otherwise required, faculty members with higher merit scores are distributed higher merit as determined by the AUH. Appeals of merit-based salary increases shall follow the same procedure as annual evaluation appeals set forth in section 3.2.6 of this document.

6 Appendix A School of Accounting Publication Categories

Category A Publications

1. The overriding criteria for placing a publication in this category are whether the article
 - a. Adds significant new knowledge to the existing body of knowledge to which it relates;
 - b. Brings significant prestige to the School of Accounting and/or College of Business;
 - c. Is published in a prestigious, refereed journal

The greater the extent to which a publication meets all three of the above criteria, the greater is the evidence that it should be classified as Category A. In the absence of contrary evidence (provided by the author, PAC members or others), it will be assumed that articles appearing in the following journals will be considered Category A publications.

Accounting Horizons

Accounting, Organizations and Society

Auditing: A Journal of Practice & Theory

Behavioral Research in Accounting

Contemporary Accounting Research

Issues in Accounting Education (Scholarly articles)

Journal of Accounting and Economics

Journal of Accounting Research

Journal of Accounting Auditing and Finance

Journal of the American Taxation Association

Journal of Business Finance and Accounting

Journal of Information Systems

Journal of Management Accounting Research

National Tax Journal

Review of Accounting Studies

The Accounting Review

2. In addition to publications in journals in the above list, a publication in a prestigious refereed journal may be considered a Category A publication. Prestigious journals can include those that are very selective and are ranked highly by objective outside observers such as business school rankings lists, accounting and other business faculty surveys and the Financial Times.
3. If a very strong case is provided, a publication in a highly regarded journal (not listed above) or a research monograph may be considered a Category A level publication. Evidence may include:

- a. The work is widely cited or has been cited by leading authorities in the field;
 - b. The work was supported by a major grant;
 - c. The work received a national award;
 - d. The work significantly impacted policy of accounting regulators or professional bodies.
4. One Category A publication is the equivalent of two Category B publications.

Category B Publications

1. The overriding criteria for placing an item in this category are whether it
- a. Adds something new to, or disseminates something from, the existing body of knowledge in the area to which it relates;
 - b. Brings prestige to the JMU Accounting Program and/or College of Business;
 - c. Is published in a well-regarded peer-reviewed journal.

The greater the extent to which a publication meets all three of the above criteria, the greater is the evidence that it should be classified as Category B. In the absence of contrary evidence (by the author, PAC members or others), it will be assumed that articles appearing in the following journals will be considered as Category B publications:

Abacus
Academy of Business Disciplines Journal
Accounting & Business Research
Accounting and Finance
Accounting Business and Financial History
Accounting Education: An International Journal
Accounting Educators' Journal
Accounting Historian's Journal
Accounting and the Public Interest
Accounting, Auditing and Accountability
Advances in Accounting
Advances in Accounting Information Systems
Advances in Behavioral Research in Accounting
Advances in International Accounting
Advances in Management Accounting
Advances in Public Interest Accounting
Advances in Taxation
AIS Educator Journal
Australian Accounting Review
Behavioral Research in Accounting

British Accounting Review
CA Magazine
Cost Management
CPA Journal
Critical Perspectives in Accounting
Current Issues in Auditing
Financial Accountability and Management
Financial Analysts Journal
Financial Executive
Fraud Magazine
Government Finance Review
Internal Auditing
Internal Auditor
International Journal of Accounting
International Journal of Accounting, Auditing and Performance Evaluation
International Journal of Intelligent Systems in Accounting, Finance, and Management
Issues in Accounting Education (Cases and Instructional Materials)
Journal of Accountancy
Journal of Accounting and Public Policy
Journal of Accounting Education
Journal of Accounting Literature
Journal of Applied Business Research
Journal of Cost Analysis
Journal of Emerging Technologies in Accounting
Journal of Financial Reporting
Journal of Forensic and Investigative Accounting
Journal of Forensic Accounting Research
Journal of International Accounting Research
Journal of International Accounting, Auditing, and Taxation
Journal of International Financial Management and Accounting
The ATA Journal of Legal Tax Research
Journal of Small Business Management and Entrepreneurship
Journal of Taxation
Journal of Teaching in International Business
Management Accounting Quarterly
Management Accounting Research
Practical Tax Strategies
Research in Accounting Regulation
Journal of Government and Nonprofit Accounting
Research on Professional Responsibility and Ethics in Accounting
Review of Business Information Systems
Southern Business and Economic Journal
Strategic Finance
Tax Adviser

2. In addition to publications in journals in the above list, a publication in a well-regarded, peer-reviewed journal may be considered a Category B publication. Well-regarded peer-reviewed journals are:

- a. Consistently ranked moderately high to high by surveys of accounting faculty;
- b. Selective and/or highly circulating;
- c. Published by well-respected institutions.

The greater the extent to which a journal meets all three of the above criteria, the greater the evidence that the publication should be classified as Category B.

4. If a strong case is provided by the author, a publication may be considered a Category B level publication. Evidence may include:

- a. The work is cited or has been cited by leading authorities in the field;
- b. The work was supported by a grant;
- c. The work received an award;
- d. The work has impacted the accounting regulators or professional bodies.

5. "Category B equivalency items" do not meet the definition of the B category outright, but are allowed in limited numbers as substitutions. Such items may include:

- a. Co-editorship of a peer-reviewed anthology or other peer reviewed work published by a nationally or internationally recognized publisher
- b. Peer-reviewed monographs or chapters in books published by a nationally or internationally recognized publisher
- c. Presentations included at a selective, peer-reviewed national level conference where the content is written in manuscript format and publicly distributed (such as in a proceedings), assuming the content adheres to criteria for Category B publications
- d. Three "C" Publications.
- e. Obtaining a professional certification (such as CPA, CMA, etc.) with prior approval by the School of Accounting PAC.

6. Consistent with the mission of the JMU COB and School of Accounting, if a case is provided by the author that an item of instructional development makes a significant

contribution to accounting education, the item may be considered a "Category B equivalency item." Evidence may include:

- a. The teaching materials/case/method is used at several universities
- b. The article/monograph is cited in major text books
- c. The article/monograph is assigned reading at several universities.

Category C Publications

1. The overriding criterion for placing an item in this category is that it involves scholarly effort. The publication should bring recognition to JMU's Accounting Program and the College of Business. A few examples of journals that historically have published "C"-level articles include:

Accounting Today

Datamation

New Accountant

Practical Accountant

2. Three Category C publications substitute for a "Category B equivalency item," not a Category B publication.

Other Guidance

1. Simply because a journal is not listed in a category's representative list does not mean a particular article cannot be counted in that category. Articles published in journals not listed in one of the above representative lists will be considered on a case by case basis by the Personnel Advisory Committee by applying criteria for each category. Candidates should play an active role in providing information for this decision.
2. The representative lists may be revised from time to time to remain current with changing journal standings.
3. In the case of a conflict between information in the guidelines and this supporting document, the guidelines should prevail.
4. Continuous, ongoing publication is an important dimension of all promotion decisions.

7 Appendix B RTA Scholarly Accomplishments/Professional Qualifications

The following is a non-exhaustive list of activities supporting scholarly accomplishments/professional qualifications:

1. Continuing Education and Certification
 - Earned and/or maintained at least one recognized professional certification in the field relating to the teaching assignment, in the past five years
 - Documented attendance at continuing education professional classes that are significant in length.
 - Completed a faculty externship with a company.
2. Consulting
 - Work on a significant consulting project (paid or unpaid) that is material in terms of time and substance; consulting services should demand a high degree of expertise and experience in the academic discipline where the PA teaches
 - Other forms of substantive linkages to practice, consulting, and other forms of professional engagement that require extensive interaction with organizations outside of JMU.
3. Boards
 - Serves on a board or other oversight position for a profit or not-for-profit organization where the duties are significant in time and scope, and the duties are related to the discipline in which one teaches.
 - Serves on the board or other officer position, or serves in another capacity involving significant participation, for an international/national professional organization in the discipline.
4. Recognized Professional Expertise in Teaching Discipline
 - Invited talks or keynote speeches delivered to professional audiences
 - Development and presentation of continuing professional education, executive education programs, and/or practitioner-based webinars
 - Ongoing and sustained participation in professional events that focus on the practice of business, management and related issues.
 - Service on an AACSB or ABET accreditation visit team.
5. Other Publications Not Meeting Definition of Quality Peer-Reviewed Journal Article
 - Publication within a professional practitioner or occupation trade publication
 - Case study published in non-refereed outlet.
 - Published manual, guide or textbook supplement.
 - Textbook related to area of teaching.
 - Scholarly book in one's discipline.
6. University Administrative Duties (counts as one practitioner activity)
 - Full-time administrative roles include Dean, associate Dean, academic unit head, director of a school, MBA director.
7. Peer Reviewed Quality Publication (See Appendix A)