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**Updated July 31, 2019** to be consistent with the new Collective Agreement, Schedule B, Faculty Service Officers, formerly known as the Faculty Service Officer Agreement. Changes include:

- FSO Agreement Articles replaced with corresponding Articles from the Collective Agreement
- “faculty members” and “staff” changed to “Academic Faculty members”
- Table added from the Collective Agreement regarding probationary periods.
- Collective Agreement Article A6.03.4 re teaching quality added to section on Evaluation of teaching activities
- Collective Agreement Article A6.03.5 re multi-year research projects added to the Research section

# FEC STANDARDS FOR FACULTY SERVICE OFFICERS

Faculty of Medicine & Dentistry, University of Alberta

APPROVED BY ATS – MARCH 2018

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# Part I: General Information

## Introduction

This document updated the 2006 Faculty of Medicine & Dentistry's Faculty Evaluation Committee Guidelines, originally as a companion document to the 2017 Faculty Service Officer (FSO) Agreement of the University of Alberta. That Agreement detailed the policies and procedures to which all FSOs must abide, and it was subsequently updated in 2019 to the 2018-2020 *Collective Agreement and Chapter B-Faculty Service Officers*. As there is variability between Faculties, each Faculty must describe more specifically its expectations for its academic members. In any form of discrepancy/dispute between this document and the 2018-2020 *Collective Agreement and Schedule B – Faculty Service Officers*, the Collective Agreement and Schedule B is the authoritative document.

Reference Documents:

- 1) Collective Agreement and Chapter B FSO : <https://www.ualberta.ca/faculty-and-staff/my-employment/collective-agreements-and-handbooks>

At the University of Alberta, many people contribute to the success of the Faculty of Medicine & Dentistry ("FoMD"), including FSOs who perform diverse duties. Some are involved primarily in research, while others are involved in laboratory/facility management, centre management, research support, teaching, or teaching support. This document provides information on how FEC recognizes these activities.

Recognizing this variation in responsibilities and duties among FSOs, the Department Chair develops and provides a detailed job description for each FSO appointment. Where possible, the Department Chair will also indicate the required frequency and time commitments of a particular activity and/or the standard of performance for each particular task.

As per Article B1.01.1 of Schedule B (Faculty Service Officers) of the AASUA 2018-2020 Collective Agreement:

"Faculty Service Officer" (or "FSO Member") means a person who has been appointed under this Schedule B to a position in which the FSO Member has been or may be granted a Continuing Appointment and who collaborates with Academic Faculty members in teaching and research. An FSO Member will normally have a post-graduate degree in the particular discipline to which they are attached. The tasks they are assigned may include an administrative and/or service component but this will not be a major component of the assignment. A position in this category shall be established under the same procedures as those used for Academic Faculty positions. FSO Members shall be counted with Academic Faculty in the staff count except for purposes of calculating the merit Increment pool for Academic Faculty and FSO Members."

"Key responsibility" for the Faculty of Medicine & Dentistry an element or domain in the job

description that requires 20% or more of the position's time commitments.

As per Article 1.27 (b) of the AASUA 2018-2020 Collective Agreement:

"Staff member" means a person who is a member of the bargaining unit, defined as the group of employees of the Board designated as academic staff members by the Board in accordance with Section 60(2) of the Post-Secondary Learning Act (Alberta), and who have been appointed under this Agreement in one of the following categories:

b) Faculty Service Officer (or "FSO Member"), at the rank of FSOI, FSOII, FSOIII, FSOIV and in accordance with Schedule B, including persons appointed under the predecessor Faculty Service Officer agreement;

### Responsibilities within the Faculty

As per Article B2 of Schedule B, the Dean provides each FSO Member a written position description of the general responsibilities of the position. The Department Chair assigns the specific duties to the FSO Member. The FSO Member submits to the Chair an annual report on university responsibilities and duties during the previous year. The Department Chair provides the requirements for the annual report to the FSO Member. This report informs the Faculty Evaluation Committee's decisions on merit allocation, movement from probationary to continuing appointment, and promotion from rank to rank for the FSO Member according to their job description.

To facilitate a FSO Member's success each Department Chair shall:

- review with the FSO Member their written description of responsibilities ("job description"), with clearly defined time-commitment expectations (as expressed as a portion of 1.0 FTE) for research, teaching, service, and, where applicable, clinical work, when the FSO Member begins the FSO Member's position at the University of Alberta;
- ☐ meet with the FSO Member at least annually to
  - review the member's Annual Report and the alignment of reported contributions with the current position description;
  - discuss their performance quality, progress and trajectory;
  - update the job description with the FSO Member as needed (if a job description changes, it is agreed to and signed off by the Chair and the FSO Member)
  - discuss career goals and offer/refer to mentorship support, and other needed faculty development supports;
  - discuss merit recommendations;
  - briefly review the FEC process and FEC Standards as needed; and
  - review components within the University of Alberta's Statement of Ethical Conduct, including the Conflict of Interest Policy.

While the Department Chair (and/or designate) is expected to provide career guidance to the FSO Member, ultimately the responsibility for performance rests with the FSO Member.

To facilitate success, each FSO Member will: (Articles B2.02 & B2.03)

- be responsible for discussing their job description at least annually with their Department Chair;
- comprehensively document their relevant work and achievements using the Annual Report;
- discuss any requested changes to their job description with (their Divisional Director, if applicable and) their Department Chair;
- seek out appropriate faculty development support including but not limited to mentorship support; and
- participate in lifelong learning activities pertinent to their job description.

## Part II: Faculty Evaluation Committee Process

The Faculty Evaluation Committee (FEC) exists to promote the standards of each Faculty and to “provide some degree of uniformity among Departments, and consistency in the yearly application of these criteria” (Faculty of Arts, FEC Standards 2014).

### 1. **FoMD FEC Composition** (Article A6.06.1 Subject to A6.18.11 and A6.21.5 (g) of the AASUA 2018-2020 Collective Agreement and B6.06.1 & B6.06.2 for Schedule B – Faculty Service Officer of the AASUA 2019-2020 Collective Agreement)

Ex Officio (Voting) members:

- Dean of FoMD (Chair of the FEC)
- All FoMD Department Chairs
- One representative from the President’s Review Committee

Elected (Voting) members

- Eight faculty members
- One elected tenured representative of the Department for the Faculty member in consideration of tenure or renewal of a probationary appointment
- One FSO representative external to the FoMD appointed by the Provost whenever an FSO is being heard for both continuation of appointment, promotion of rank, and for merit

Ex Officio (Non-voting) members:

- Vice-Dean, Faculty Affairs
- Vice-Dean, Education
- Vice-Dean, Research
- Associate Dean, Faculty Development
- AHS Edmonton Zone Medical Director or delegate

Voting procedures:

- Quorum= 80% of voting members of FEC

- Simple majority of FEC voting members present determines decisions taken
- The Chair of the FEC votes in the event of a tie

The FEC evaluates tenure-track faculty, Faculty Service Officers, and other academic staff in continuing appointments at the direction of Faculty Council.

## 2. FSO Performance Reviews

- Overview for FEC and academic staff members
- Leaves
- Standards of Performance
- Annual awards of increment
- Probation and Continuing Appointments
- Promotion through the FSO ranks (FSO –I, FSO –II, FSO – III, FSO – IV)

### A. Overview for FEC and FSO Members

FEC annually assesses FSO's as per the process described under *Responsibilities within the Faculty* earlier in this document. Assessment of each FSO Member is in accordance with the performance indicators in his/her job description.

As per Article B6 of Schedule B of the AASUA 2018-2020 Collective Agreement and considering the responsibilities developed and agreed upon with the Chair of the Department, review and assessment of a FSO Member's performance occurs annually. The standards of expected performance are higher in the higher ranks and as progress through the ranks occurs. Meritorious performance and not length of service guide FEC increment and promotion decisions.

Article B6.11.1: A FSO Member whose appointment takes effect in the period July 1 to October 1, inclusive, is eligible to receive a full increment at one of the values referred to in Article B6.09.10 on the next following July 1.

Article B6.11.2: A FSO Member whose appointment takes effect in the period October 2 to June 1, inclusive, is eligible to receive a pro-rated increment on the next following July 1, the proportion of a full increment depending on the number of months he or she will have served by July 1. A FSO Member whose appointment takes effect in the period June 2 to June 30, inclusive, will not be eligible to receive an increment on the next following July 1.

Promotion and awarding Continuing Appointment –Articles B6.12. 1 to B6.12.5

The decision to award continuing appointment is based on an indication that the FSO Member is and will in the future be capable of contributing effectively as a FSO Member given the performance, while on probation, in the responsibilities of a FSO Member.

During the probation period, changes to the standards for the award of continuing appointment cannot occur for an individual FSO Member unless the FSO Member agrees, in advance of the hearing of FEC, to the new standards.

B. Leaves:

Leaves– Articles B6.05.1 to B6.05.3

Article B6.05.1: Discontinuance of professional responsibilities during periods of Maternity Leave, Parental Leave and Medical Leave (when the total of such periods of leave is less than 6 months in an academic year) shall require the extrapolation of the quality of performance for work done in the year to the full year.

Article B6.05.2: Period of secondment, disability leave, Assisted Leave and other forms of leave with pay, with partial pay or with no pay (as well as periods of leave or combination of leaves exceeding 6 months) shall not be considered in the evaluation of performance.

Article B6.05.3: Notwithstanding Article B6.05.2, an FSO Member may request the Department Chair and FEC to take into account professional activities while on leave. The onus shall be on the FSO Member in material appended to the Annual Report to demonstrate to the Chair why such activity should be recognized.

Further, refer to Article 14.09 of the Reference Manual for Faculty Evaluation Committees (September 2019) for the options for evaluation with a Childbirth Leave.

Article B6.05.3: Notwithstanding Article B6.05.2 of Schedule B of the AASUA 2018-2020 Collective Agreement, a FSO Member may request the Department Chair and FEC to take into account professional activities while on leave. The onus shall be on the FSO Member in material appended to the Annual Report to demonstrate to the Chair why such activity should be recognized.

C. Standards of Performance:

The FEC of the Faculty of Medicine & Dentistry recognizes four Standards of Performance:

1. Excellent:  
Performance that is: a) functioning beyond commendable for their rank and/or percentage of position description, and/or b) distinguishing and expanding skills/learning opportunities/stewarding our people, our work and service.

2. Commendable:  
Performance that is beyond Acceptable will be distinguished for merit.
3. Acceptable:  
This standard may be recommended when the staff member's performance demonstrates a significant deficiency in one domain of evaluation, but performs well in the other domains or when the staff member overall performs below expected for rank, but remains within a satisfactory range (both are o.B). When the staff member reaches maximum rank, (o.A) is the other use.
4. Unacceptable:  
Performance of position description expectations is unsatisfactory (o.D).

#### D. Annual Award of Increment

As per Articles B6.09.1 to B6.11.2 of the Schedule B of the AASUA 2018-2020 Collective Agreement,

Article B6.09.1: Each year the Department Chair recommends to FEC whether a FSO Member should receive an increment based on performance in the preceding year. The Department Chair submits a recommendation to FEC for each FSO Member in the Department. The recommendation shall be one of the following:

- a) A single increment;
- b) A multiple increment, which may be one and one-half, double, two and one-half, or triple a single increment;
- c) A one-half increment, which is one-half of a single increment;
- d) a partial increment, which is an increment that is less than a single increment but not a one-half increment and which will bring the salary of a FSO Member to the salary ceiling of the FSO Member's present rank;
- e) a special increment, which is an increment that is greater than a single increment but not a multiple increment, which will bring the salary of a FSO Member to the salary minimum of the next higher rank; or
- f) No increment
- g) In addition to the above, Increments may be awarded in quarter Increments ranging from 0.50 to 3.00 (i.e., 0.50, 0.75, 1.00, 1.25, 1.50, 1.75, 2.00, 2.25, 2.50, 2.75, 3.00).

Article B6-09.2: An increment award of less than 1.0 is appealable.

As per Article B6.10, Schedule B (AASUA 2018-2020 Collective Agreement), if a Department Chair recommends that no Increment be awarded to a FSO member, or if FEC decides that no Increment be awarded to a FSO member, in either or both cases, the decision shall be cited as one of the following:

- a) That maximum for rank has been reached and standards for promotion have not been met but performance is acceptable notwithstanding; (=oA)
- b) That performance requirements for an increment have not been met but performance is acceptable notwithstanding; (=oB)
- c) That academic performance while on authorized leave could not be properly evaluated; (=oC)or
- d) That academic performance is unsatisfactory and unacceptable.(=oD)

#### E. Probation and Continuing Appointments

FSO members are appointed either as a FSO member with a continuing appointment, or as a FSO member on probation leading to consideration for a continuing appointment.

Prior to making an appointment of an FSO, the Dean first receives a recommendation from an advisory selection committee established in accordance with procedures approved by GFC.  
Article B1.01.2

An appointment as an FSO I is a probationary appointment.

##### *i. Probationary periods*

Articles B5.01.1 to B5.03.2

Article B5.02.2: A staff member without a continuing appointment shall serve a probationary period calculated in accordance with the following:

Effective Date of Appointment	Probationary Period
July 1	3 years
Between January 1 and the next June 30 (including January 1 and June 30)	3 years plus the period between the effective date and the next July 1 (inclusive of both dates)
between July 2 and the next December 31 (including July 2 and December 31)	3 years minus the period between the effective date of appointment and the preceding July 1 (inclusive of both dates)

Article B5.02.3: The Dean, with the approval of the Provost may in the initial appointment, reduce the length of the probationary period.

Article B5.02.4: If an FSO Member is granted one or more leaves during a probationary period and if the length or type of leave is such that it materially affects the performance on which the FSO Member is to be assessed, then the probationary period shall be extended for one or more years.

Article B5.02.5: An extension of a probationary period because of leave shall be made by the Provost on the recommendation of the dean following consultation with the FSO Member.

Article B5.02.6: In considering a recommendation for an extension of a probationary period because of leave, the Provost shall take into account the length of the leave period, the time of the year when the leave was taken and the purposes of the leave.

Article B5.02.7: The decision of the Provost regarding extension of probationary period because of leave shall be final and binding.

*ii. Awarding Continuing Appointment (Decision at the end of the probationary period)*

Article B5.03.1: At least 90 days before the expiry of the FSO Member's probationary appointment the Dean shall recommend to FEC in writing with a copy to the FSO Member that:

- a) A Continuing Appointment be offered to the FSO Member.
- b) That no further appointment be offered to the FSO Member.

Article B5.03.2: FEC shall consider a recommendation under Article B5.03.1 and shall make one of the following decisions:

- a) That a Continuing Appointment be offered to the FSO Member, or
- b) That no further appointment be offered to the FSO Member.

Schedule B of the 2018-2020 Collective Agreement, Article B6.03.8: The decision to award a Continuing Appointment shall be based on an indication that the FSO Member is and will in future be capable of contributing effectively as an FSO Member given the performance, while on probation, in the responsibilities of an FSO Member

The granting of a continuing appointment requires that the applicant meet the performance indicators in all areas of key responsibility in his/her job description.

There is no connection with receiving a continuing appointment and promotion to the next FSO rank.

#### F. Promotion through the Faculty Service Officer ranks

As required in the Agreement for Faculty Service Officers, (Article B6.03.6 of Schedule B) standards of performance are greater for individuals in the higher ranks.

Promotion to a higher rank assumes expansion and enhancement of the current position's performance indicators. Time in role is insufficient, on its own, to justify promotion without commensurate increase in expectations and responsibilities.

The Department Chair notifies the FSO Member of his/her eligibility for promotion. An FSO is eligible when their salary is within one increment of, or above, the salary minimum for the next higher rank.

Article B6.12.3 Schedule B: FEC shall review the performance over the entire career in considering a case for promotion. Review of a candidate's entire record occurs when considering promotion to a higher rank.

Criteria for promotion require that the candidate consistently meets performance indicators in all areas of key responsibility and exceeds performance indicators in at least one area of key responsibility, according to their job description. Alternatively, consideration for promotion occurs when the FSO demonstrates that he/she has successfully executed additional and/or alternative key responsibilities and has the potential to continue this level of performance.

Expectations considered during the FSO promotion process:

##### Faculty Service Officer I

In accordance with their job description, the FSO will:

- work effectively with supervisors in contributing to Faculty and departmental education, research, and/or administrative activities;
- be technically and/or professionally competent in their specific area(s) of responsibility; and
- provide timely and useful support and service to faculty and administrative staff.

##### Faculty Service Officer II

In accordance with their job description, the FSO will in addition to the above:

- work under minimal direction in contributing to faculty and departmental education, research, and/or administrative activities;

- demonstrate effective teaching skills (if applicable) through satisfactory evaluations from students, peers, coordinators, and/or the Department Chair;
- maintain technical and/or professional competence in their specific area(s) of responsibility;
- be pro-active in providing support and service to faculty and administrative staff; and
- work with supervisors to represent departmental and faculty interests at the university level.

#### Faculty Service Officer III

In accordance with their job description, the FSO will in addition to the above:

- demonstrate leadership and initiative in contributing to faculty and departmental education, research, and/or administrative activities as applicable;
- demonstrate effective teaching skills (if applicable) through satisfactory evaluations from students, peers, coordinators and/or the Department Chair;
- play a significant role in curriculum development, implementation of new courses, and the introduction of new instructional technologies and/or methods of delivery (if applicable);
- demonstrate increasing technical and/or professional competence in their specific area(s) of responsibility;
- manage research projects, budgets, services, centre operations, and/or departmental teaching programs competently;
- supervise other staff members effectively;
- provide meaningful advice in their area(s) of expertise to faculty and administrative staff, and
- liaise with other university entities.

#### Faculty Service Officer IV

In accordance with their job description, the FSO will in addition to the above:

- demonstrate independence of action and judgment consistent with participation in senior management in contributing to faculty and departmental education, research, and/or administration activities as applicable;
- demonstrate exceptional teaching skills (if applicable) through outstanding evaluations from students, peers, coordinators and/or the Department Chair;
- provides leadership role in curriculum and program development, implementation of new courses, and the introduction of new instructional technologies and/or methods of delivery (if applicable);
- demonstrate significant initiative and leadership in managing research projects, budgets, services, centre operations, and/or departmental teaching programs, as required in their position description;
- supervise other staff members effectively;
- provide significant and outstanding technical support to research faculty;
- provide substantive and meaningful advice to senior faculty and administrative staff on

- regarding teaching, research and/or service, and
- initiate, develop and improve liaisons with other university entities and with relevant external groups.

#### Examples of Teaching, Research, and Service Activities

##### **Participation in Teaching:**

FSOs may be involved in teaching a variety of learner groups:

- Undergraduate: UME, dentistry, dental hygiene, radiation therapy, lab med sciences, undergraduate students from other UofA Faculties (e.g. Faculty of Science)
- Post-Graduate Medical Education
- Graduate Students
- Post-Doctoral Fellows
- Colleagues from FoMD and other faculties and from the community (local, national, global),
- Allied health and administrative colleagues, or
- Other individuals/groups

FSOs may be involved in a variety of teaching opportunities. Some examples include, but are not exclusive to:

- Classroom-based (small and large group individual or series),
- Workplace based (ward/clinic/lab),
- Summative opportunities (evaluations, exams such as candidacy and other orals, for example, STACER/OSCEs),
- Formative opportunities (mentoring, supervision, feedback),
- Teaching products (e.g. curriculum, assessment products, course objectives) are best reported within research (if peer-reviewed, disseminated and impact/outcome described or in service/administration), or
- Faculty development and Continuous Professional Learning/Life-Long Learning
- Supervision of trainees (1:1), e.g. summer students, graduate students

Quality of teaching is assessed at FEC through a combination of: learner evaluations, peer-evaluation, narrative self-reflection on teaching, teaching awards, complexity of teaching material, number and complexity of learners (e.g. mixed learner levels, learners in remediation), and participation in professional development related to teaching.

To move through the FSO ranks, FSO's should progress from direct teaching delivery with satisfactory evaluations, to having a consistent higher quality of teaching, **and** be developing teaching material (e.g. curriculum, assessment material), **and/or** supervising trainees

##### **Participation in Research:**

FSO's may be involved in a variety of research opportunities. In the Faculty of Medicine & Dentistry, any type of scholarship (Discovery, Integration, Application, or Teaching) that applies Glassick's criteria (clear goals, adequate preparation, appropriate methodology,

significant results, effective presentation, and reflective critique) are potential research items assessed at FEC.

Some examples include, but are not exclusive to:

- research funding application (successful and unsuccessful grants will be discussed at FEC)
- Presentations at various venues: conferences, academic institutions, academic meetings are of higher quality than presentations to the media, lay-community; and depending on the field, an oral presentation to a large international audience may have more impact than a publication.
- Social Media: blogs, Twitter, webpage, YouTube, etc. are generally lower quality venues, unless peer-review, uptake and impact can be described.
- Public Compendiums: MedEDPortal, MedEDPublish, vodcasts, podcasts.
- Publications (print or electronic): books, book chapters, original research articles, review articles, guidelines, case reports/series, editorial; an abstract as part of a conference proceeding should be listed as a product of scholarship or with presentation.
- Educational Products: exam questions (MCQ, SAQ, OSCE), evaluation forms, new curriculum, new assessment forms/techniques
- peer-reviewed needs assessment;
- entrepreneurship leading to new employment of others, or
- tangible products of commercialization (e.g. new patent, new company)

To progress through the FSO ranks based on research activities, the FSO Member should demonstrate increasing quality of research activities (e.g. products disseminated beyond the local level, research with a greater impact)

### **Provision of Service:**

FSO's may be involved in a variety of service opportunities. Some examples include but are not exclusive to:

- committees, task forces, or editorial/scientific boards
- guideline/policy development
- search and selection
- centre/institute/lab management
- reviewing scientific work (manuscripts, abstracts, grants)

Quality of service is assessed at FEC through a combination of: volume of service work, complexity of service work, staff member's role (e.g. committee member vs committee chair), the extent to which the service work contributes to a positive change, and the scope of the work (local vs national).

To progress through the FSO ranks, FSO Member's will demonstrate higher quality service work.

## Documentation for Continuing Appointment or Promotion Applications

The following documents are required for application for continuing appointment or promotion to a higher rank:

- The job description, which must include specific performance indicators for each area of key responsibility
- A letter from the Chair of the department
- A letter from the applicant summarizing work since appointment.
- An up-to-date curriculum vitae
- Any materials produced as part of the work done
- Any publications or presentations, if applicable
- A teaching dossier, if applicable
- Letters of reference, chosen by the Department Chair, from three referees who can directly attest to the quality of the individual's performance in an area or areas of key responsibility
- All documents must be submitted to the to the Dean's office by the beginning of October, members need to check with their departments about earlier internal deadlines. All letters of reference are sent directly to the Department Chair. The Department Chair may request written assessments from other faculty or administrators, as relevant.

### Supplementary Professional Activities (SPA)

As per Article B3 of Schedule B of the 2018-2020 AASUA Collective Agreement, a staff member has a primary obligation to fulfil University responsibilities. The University expects staff members to remain current with recent developments in their discipline through personal professional development. Guidance for Supplemental Professional Activities apply to Faculty Service Officers and Faculty Service Officers-Teaching Professors.

FSO Members may undertake Supplemental Professional Activities at, and/or outside, the University. Articles Article B3 of Schedule B of the 2018-2020 AASUA Collective Agreement provide specific guidance.

The FSO Member must exercise care that the outside activities are not in conflict of interest with the University duties.

FEC may take into account supplementary professional activities in the evaluation of a FSO Member's performance for continuing appointment, promotion and merit increment decisions.

## **Part IV: Evaluation of FSO Teaching Professors**

### **A. Introduction**

With University approval, the Faculty of Medicine & Dentistry introduced a new category of FSO in 2011 known as the “teaching professor” track. This track supported the important role played by academic physicians who are primarily clinician educators. Following 2011, FSOs with teaching job expectations greater than 50% could apply to become FSO-Teaching Professors (FSO-TP).

The standards for the “teaching or educational professor” are similar to faculty member standards and expectations but without the 10% minimum requirement for research activity. Review of any FSO’s or FSO-TP’s performance must be based on the duties they have been assigned (Schedule B of the 2018-2020 AASUA Collective Agreement, Article B2.02). Therefore, when recommending merit increments or promotion, a Department Chair must relate the evaluation to the specific objectives and performance indicators in the job description and to the Standards for Faculty Service Officer-Teaching Professor ranks (below).

### **B. Performance Standards for Faculty Service Officer Ranks**

As per the Schedule B of the 2018-2020 AASUA Collective Agreement, standards of performance are greater for individuals in higher ranks, anticipating the changing composition of engagement from that of participation in activities, to a role with more contribution and leadership. Activities include:

Learner Groups	Teaching Activities
Undergraduate: UME, dentistry, dental hygiene, radiation therapy, lab med sciences, undergraduate students from other UofA Faculties (e.g. Faculty of Science)	Classroom-based (small and large group individual or series)
Post-Graduate Medical Education Graduate Students Post-Doctoral Fellows	Workplace based (ward/clinic/lab)  Summative opportunities (e.g. evaluations, exams (candidacy, STACER, OSCEs)
Colleagues from FoMD and other faculties and from the community (local, national, global) Allied health and administrative colleagues	Formative opportunities (mentoring, supervision, feedback)  Teaching products (e.g. curriculum, assessment products, course objectives) are best reported within research (if Glassick's criteria met)  Faculty development and Continuous Professional Learning/Life-Long Learning  Supervision of trainees (1:1), e.g. summer students, graduate students  Supervision of trainees (1:1), e.g. summer students, graduate students  Supervision of trainees (1:1), e.g. summer students, graduate students

Quality of teaching is assessed at FEC through a combination of: learner evaluations, peer-evaluation, narrative self-reflection on teaching, teaching awards, complexity of teaching material, number and complexity of learners (e.g. mixed learner levels, learners in remediation), and participation in professional development related to teaching.

To move through the FSO-TP ranks, FSO-TP's progress from direct teaching delivery with satisfactory evaluations, to having a consistent higher quality of teaching, **and** be developing teaching material (e.g. curriculum, assessment material), **and/or** supervising trainees. For promotion, FSO-TP's also demonstrate consistent capability to maintain performance over time.

### **Faculty Service Officer I-Teaching Assistant Professor**

In accordance with their position description, the FSO-TP will:

- work effectively with supervisors in contributing to faculty and departmental education, research/scholarship, and/or administrative activities;
- be technically and/or professionally competent in their specific area(s) of responsibility; and
- provide timely and useful support and service to faculty and administrative staff.

### **Faculty Service Officer II-Teaching Assistant Professor**

In accordance with their job description, the FSO-TP will:

- demonstrate increased participation and engagement under minimal direction in contributing to faculty and departmental education, research/scholarship, and/or administrative activities;
- demonstrate teaching mastery (if applicable) through satisfactory evaluations from students, peers, coordinators, and the Department Chair;
- maintain technical and/or professional competence in their specific area(s) of responsibility;
- be proactive in providing support and service to faculty and administrative staff; and
- work with supervisors to represent departmental and faculty interests at the university level.

When applying for FSO II, letters from three referees (any relationship must be disclosed) chosen by the Department Chair, who can directly attest to the quality of the individual's performance in an area or areas of key responsibility, are required.

### **Faculty Service Officer III-Teaching Associate Professor**

In accordance with their job description, the FSO-TP will:

- demonstrate increasing engagement in contributions and leadership in Faculty and departmental education, research/scholarship, and/or administrative activities as applicable;
- demonstrate teaching mastery (if applicable) through satisfactory evaluations from students, peers, coordinators and the Department Chair;
- contribute significantly to curriculum development, implementation of new courses, and the introduction of new instructional technologies and/or methods of delivery (if applicable);
- demonstrate increasing technical and/or professional competence in their specific area(s) of responsibility;
- manage research/scholarship projects, budgets, services, centre operations, and/or departmental teaching programs competently; and
- demonstrate leadership by:
  - supervising other staff members effectively;
  - providing meaningful advice in their area(s) of expertise to faculty and administrative staff, and
  - collaborating with other University entities.

When applying for FSO III-Teaching Professor five letters from referees (any relationship disclosed) are required:

- All are chosen by the Department Chair
- At least three are external to the University of Alberta
- All responses received by the Department Chair should be considered by the FEC

#### **Faculty Service Officer IV-Teaching Professor**

In accordance with their job description, the FSO-TP shall:

- demonstrate independent action and leadership through engagement in senior management contributing to faculty and departmental education, research/scholarship, and/or administration activities as applicable;
- demonstrate exceptional teaching skills (if applicable) through outstanding evaluations from students, peers, coordinators and the Department Chair;
- provide leadership in curriculum and program development, implementation of new courses, and the introduction of new instructional technologies and/or methods of delivery (if applicable);
- provide significant leadership in managing research/scholarship projects, budgets, services, centre operations, and/or departmental teaching programs, as required in their position description;
- supervise other staff members effectively;
- provide significant and outstanding technical support to research faculty;
- provide substantive advice on curriculum development, research/scholarship plans, and/or project proposals as applicable to senior faculty and administrative staff; and
- initiate, develop, and improve liaisons with other university entities and with relevant

external groups.

When applying for FSO IV, Teaching Professor, five letters from referees (any relationship disclosed) are required:

- All are chosen by the Department Chair
- All are external to the University of Alberta
- All responses received by the Department Chair should be considered by the FEC

In addition to the letters from Referees as indicated above, the following documents are required for application for continuing appointment or promotion:

- The job description, which must include specific performance indicators for each area of key responsibility
- A letter from the Chair of the department
- A letter from the applicant summarizing work since appointment.
- An up-to-date curriculum vitae
- Any materials produced as part of the work done
- A teaching dossier

Submit the documents by the beginning of October to the Dean's office; members need to check with their departments about earlier internal deadlines. The Department Chair directly receives the letters of reference. The Department Chair may request written assessments from other Faculty or administrators, as relevant.