

Submitted: September 11, 2023

Approved by the Dean's Office and Office of the Provost: September 11, 2023

Memo on Post-Tenure Review (PTR) Criteria

To comply with BOG Regulation 10.003, the University of South Florida (USF) has developed a Post-Tenure Faculty Review Regulation 10.003, which provides authority for administering Post-Tenure Faculty Review (PTR) at USF. PTR is required for all tenured faculty members at the University of South Florida in accordance with State law.

The Zimmerman School will follow USF Regulation 10.003 and *Procedures for Post-Tenure Review at USF* with regard to all aspects of PTR, including Timing and Eligibility, Review Requirements, Process Requirements, Outcomes, Monitoring and Reporting

With regard to PTR review criteria USF Regulation 10.003 Section II(3)(b) states:

Since tenured faculty at the University of South Florida undergo annual merit evaluations post-tenure, it is expected that the post-tenure review criteria for a comprehensive 5-year review shall be based on currently approved unit-level or college-level criteria consistent with rank and assigned duties. Evaluations shall be based on rating categories of Post-Tenure Review BOG Regulation 10.003 or follow university level guidance provided in section (3)(c).

Accordingly, The Zimmerman School, with concurrence of the faculty, has developed criteria (see attached document: *Zimmerman School of Advertising & Mass Communications Post-Tenure Review (PTR) Evaluation Matrix*) for each comprehensive 5-year PTR review based on its currently approved criteria for Tenure & Promotion (T&P) and Annual Evaluations, as specified consistent with rank and assigned duties. With regard to the use of The Zimmerman School's T&P criteria, the PTR will not involve external review letters, but the T&P criteria will be used as a benchmark for general performance expectations.

The PTR assessment will be based on a "review packet" composed of the following materials:

- The faculty member's narrative record of accomplishments for the past five years in a university-designated template. This narrative will have a maximum limit of 12,000 characters.
- The last five years of annual performance reviews by the Director,
- The faculty member's curriculum vitae (CV) (not to exceed 5 pages single-spaced), and

- The faculty member's disciplinary record (if any exists) in their personnel file covering the past five years to ensure compliance with state laws, Board of Governors' regulations, and university regulations and policies. Only substantiated disciplinary matters will be considered for the purposes of a post-tenure review.

Based on the PTR assessment, an OVERALL rating will be assigned using the 4-point ordinal scale specified in USF's Post-Tenure Review (PTR) regulation II(3)(c). This OVERALL rating will be a weighted total, derived by multiplying scores from each of the three evaluative domains (i.e., Research, Teaching, & Service) by the faculty member's assignment percentage in that domain and using the sum of those figures, since that approach is most consistent with our annual evaluation system, as outlined in our governance documents.

1. **Exceeds expectations:** a clear and significant level of accomplishment beyond the average performance of faculty across the faculty member's discipline and unit. Performance is appreciably greater than the average college faculty member of the candidate's present rank and field at top-tier research institutions. Must have a sustained and satisfactory professional conduct and performance of academic responsibilities and compliance with state law, Board of Governors' regulations, and university regulations and policies.
2. **Meets expectations:** expected level of accomplishment compared to faculty across the faculty member's discipline and unit. Sustained record commensurate with the academic standards of a top-tier research institution; evidence of at least a satisfactory performance rating in each annual evaluation during the previous 5 years and satisfactory or greater assessment in each area of assignment; sustained and satisfactory professional conduct and performance of academic responsibilities and compliance with state law, Board of Governors. Exceptions might be made to the general expectation that a faculty member achieve satisfactory or greater assessment in each area of assignment in each annual evaluation during the previous 5 years provided that the faculty member addresses any lower than satisfactory ratings received during the review period in the faculty narrative and provides sufficient explanation for any lower than satisfactory ratings and evidence of subsequent improvement.
3. **Does not meet expectations:** performance falls below the expected range of annual variation in performance compared to faculty across the faculty member's discipline and unit but is capable of improvement. A faculty member who has received an overall unsatisfactory annual evaluation during one of the previous 5 years without evidence of a trajectory of subsequent improvement or exhibited unsatisfactory performance in any single area of assignment over multiple years or pattern of non-compliance with state law, Board of Governors' regulations, and university regulations and policies may be deemed to not meet expectations.
4. **Unsatisfactory:** failure to meet expectations that reflects disregard or failure to follow previous advice or other efforts to provide correction or assistance, or performance that involves incompetence or misconduct as defined in university regulations and policies. A faculty member who has received an overall unsatisfactory annual evaluation during two or more of the previous 5 years or unsatisfactory performance in two or more areas of assignment over three of the last five years of the review period may be deemed unsatisfactory. Demonstrates a consistent pattern of failing to perform duties assigned by

the University or sustained violations of applicable state and federal law and applicable published College, University, and Board of Governors regulations, policies, and procedures.

Final decisions regarding post-tenure review may be appealed under university regulations or collective bargaining agreements, as applicable to the employee.

The Zimmerman School Post-Tenure Review (PTR) Evaluation Matrix

RESEARCH

Excellence in research involves both qualitative and quantitative factors, where assessment of quality takes precedence. For purposes of Post-Tenure Review, the ZSAMC director should give great weight to judgments of quality as demonstrated by journal rankings and other indicators. The standings of journals and academic presses in which candidates published are to be considered significant indicators of quality. Assessment of research quality is a rigorous process, but primarily a qualitative one.

Evaluation ratings in the area of Research (which includes scholarship, as broadly defined in The Zimmerman School Tenure & Promotion documents) generally reflect the faculty member's research productivity (developmental and completed projects) and impact. Research/scholarly productivity should generally be commensurate with the proportion of faculty duties assigned in the research category (e.g., productivity expectations for faculty with a 40% research assignment will be higher than for faculty with a 20% research assignment).

High Impact Scholarship

1. Peer-reviewed Articles

A peer-reviewed article is an article in a peer-reviewed journal in a ZSAMC discipline (or cognate scholarly field, where appropriate), or a chapter in a peer-reviewed anthology. One such article annually per 20% research workload is expected such that a faculty member with a 40% research assignment should have a minimum of 10 high-impact publications in a 5-year period.

For forms of scholarship other than those designated as “high impact,” the faculty member should provide a brief narrative describing the work, its importance/significance, and its impact. Research activity will be evaluated holistically, not just based on the number of indicators. Faculty can meet criteria for a given rating in the domain of Research with qualifying performance indicators in one or more of the following categories:

2. Editor-reviewed Articles, including Law Reviews

Applied scholarship in the form of edited, non-refereed law review or policy journal articles that are specific to the candidate's research focus can be considered equivalent to a peer-reviewed article given the prestige and ranking of the outlet.

3. External Grants and Contracts

Applications for extramural funding are strongly encouraged—if appropriate to a candidate's field; however, funding is not required for tenure.

4. Authored research or scholarly books

An authored research or scholarly book is considered to be a work that provides a new understanding of a problem germane to ZSAMC disciplines. An authored research or scholarly book published by a reputable university or academic press is considered equivalent to no fewer than three and no more than five peer-reviewed articles. These works of research or scholarship should not be confused with discipline textbooks.

5. Peer-reviewed chapters in edited book

Chapters presenting original research or scholarship that undergo peer review and appear in edited books published by reputable university of academic presses (for which the faculty member is not an editor) can represent important research contributions. Although the effort involved in producing an edited book chapter may equal that of a peer-reviewed journal article, candidates are encouraged to concentrate the bulk of effort on articles.

6. Scholarly Monographs

A scholarly monograph is considered equivalent to no fewer than two and no more than three peer-reviewed articles. Scholarly monographs are to be placed in reputable academic presses, enforcing rigorous peer-review practices in their acceptance of manuscripts.

7. Edited Books

An edited book should be considered equivalent to between two and four peer-reviewed articles, depending upon the extent of the candidate’s original scholarly contribution and the prestige of the university or academic press. Assembling and editing an edited book is an important scholarly contribution in its own right. In addition, the candidate may also have contributed an introduction and one or more original chapters. Any such chapters should be considered in determining how much weight to place on the edited book; chapters should not be counted separately under point 5 above.

8. Additional Publications and Other Public Scholarship

Additional publications and other public scholarship meriting consideration toward tenure include, but are not limited to the following: technical papers, policy papers, articles not peer-reviewed or solicited for peer-reviewed collections, encyclopedia articles, reprints, revised manuscripts, articles published in conference proceedings, and substantial critical book reviews published in major journals.

Although candidates are expected to have averaged at least two peer-reviewed publications or equivalent per year over the course of their tenure-earning years, it is understood that evidence of scholarly productivity may vary widely from year to year.

Exceeds Expectations (1)	Meets Expectations (2)	Does Not Meet Expectations (3)	Unsatisfactory (4)
<p>Evidence of exceptional progress on (e.g., data collection, data analysis, manuscript pages written) and/or completion of--on average--at least one scholarly product or “high impact” form of scholarship per year (per T&P Document Guidelines; typically peer-reviewed article and/or substantial application for external funding, not just letter of intent) for each 20% Research Assignment annually.</p> <p>Evidence of exceptional research impact or professional recognition of the faculty member’s status as a leading</p>	<p>Evidence of significant progress on and/or completion of--on average--one scholarly product per year, at least some of which are regarded “high impact” forms of scholarship (per T&P Document Guidelines; typically peer-reviewed article and/or substantial application for external funding, not just letter of intent), but below the rate of one product for each 20% Research Assignment annually.</p> <p>Evidence of significant research impact or professional recognition of the faculty member’s status as a leading or emerging scholar in their field (e.g., applied use of</p>	<p>Little progress on any scholarly product and no completed products over the review period. Productivity is below minimum expectations within the School for most years during the review period, as assessed by standards within the T&P document.</p>	<p>Not actively engaged in research or scholarship consistent with their research assignment, for more than two years.</p>

<p>or emerging scholar in their field (e.g., applied use of one’s research/scholarship in a professional practice community, scholarly use of one’s research/scholarship to advance the profession or contribute to an important research topic/area, which may be measured qualitatively (e.g., scholarly recognition by peers, awards, or appointments) or quantitatively (e.g., h-index, citation counts, or productivity/impact “rankings”))</p>	<p>one’s research/scholarship in a professional practice community, scholarly use of one’s research/scholarship to advance the profession or contribute to an important research topic/area, which may be measured qualitatively (e.g., scholarly recognition by peers, awards, or appointments) or quantitatively (e.g., h-index, citation counts, or productivity/impact “rankings”))</p>		
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TEACHING

The Zimmerman School recognizes (a) that teaching “performance” is multidimensional, (b) that excellence in teaching can be demonstrated in different ways, and (c) ratings for some courses and for some types of courses (regardless of instructor) are typically higher or lower than others.

Consistent with this mission, ZSAMC considers “excellence” in teaching to include teaching that effectively guides students in the acquisition of disciplinary knowledge, fosters students’ critical and creative thinking skills, and helps students develop proficiency in written, oral, and mediated communication. Candidates may demonstrate excellence in teaching through a variety of teaching activities, including but not limited to:

1. Classroom teaching
 - Undergraduate and graduate course syllabi as well as instructional materials, assessment activities, and other course material
 - Course evaluations, including numerical data and narratives
 - Development of new courses, substantial revisions of current courses, or adaptation of courses to new formats and media through incorporation of emerging technologies
 - Student performance on pre- and post-instruction measures
 - Exemplary student classroom work and outcomes, including awards
 - Peer observations and evaluations (these are strongly encouraged in any year before a faculty member will apply for tenure, promotion, or mid-tenure review)
 - Documentation of innovative teaching methods
 - Service-learning classes
2. Supervision of students/faculty
 - Supervision or serving on committees for undergraduate honors theses or master’s theses
 - Supervision of independent studies or undergraduate student research projects
 - Supervision of teaching and research assistants
 - Mentorship of junior/adjunct faculty

3. Other teaching activities
- Professional development activities and efforts at improvement
 - Publication or presentation of teaching practices or scholarly research related to education in the field
 - Publication of discipline textbooks
 - Awards for scholarly research related to education in the discipline
 - Teaching awards
 - Internal or external funding received for training or student projects
 - Collaboration with outside groups
 - Participation in workshops to provide instruction to external groups or individuals
 - Mentorship of students seeking scholarships or awards

Faculty can meet criteria for a given rating in the domain of Teaching with qualifying performance indicators in one or more of the rating level descriptions.

Exceeds Expectations (1)	Meets Expectations (2)	Does Not Meet Expectations (3)	Unsatisfactory (4)
<p>Evidence of exceptional teaching performance and/or effectiveness for most years during the review period, considering indicators above, including the following:</p> <p>Student evaluation ratings predominantly and consistently at or above the School and College averages</p> <p>Completed or nearly completed development a new course or officially “refreshed” an existing course with Innovative Education, meeting all quality indicators</p> <p>Exceptional performance in facilitating student success, engagement, mentoring, professional development, and advising, which may include:</p>	<p>Evidence of teaching performance and/or effectiveness that meets minimum expectations within the School for most years during the review period, considering indicators above, including the following:</p> <p>Student evaluation ratings predominantly and consistently at the School and College averages or slightly below with a reasonable narrative explanation from the faculty member</p> <p>Maintains existing courses, with at least minimal efforts to update or improve them</p> <p>Significant progress on a new course or refreshing (updating or enhancing more than 20% of content) of an existing course for one or more of the School’s programs</p> <p>Above-average performance in facilitating</p>	<p>Evidence of below average teaching performance and/or effectiveness that fails to meet minimum expectations within the School for most years during the review period, considering indicators such as the following:</p> <p>Student evaluation ratings predominantly and consistently below the School and College averages with no reasonable narrative explanation to mitigate or contextualize them.</p> <p>Ignoring deficiencies in existing courses</p>	<p>No clear evidence of adequate teaching performance and/or effectiveness at the level expected for the rank for more than two years.</p> <p>Ignoring deficiencies in existing courses; no efforts to improve</p> <p>Syllabi fail to follow required USF template requirements, are missing critical information</p> <p>Clear evidence that faculty member is inaccessible and non-responsive to students</p>

<p>Student ratings and/or narrative suggesting exceptional accessibility/responsivity to and effective communication with students</p> <p>Faculty narrative describing how they have incorporated feedback from students into substantive course revisions and articulated a plan to assess the impact of those changes</p> <p>Faculty narrative reflecting significant, positive efforts to increase student engagement</p> <p>Faculty member has gone above and beyond usual expectations to facilitate student success, including accommodating more students when course demand is particularly high</p> <p>Faculty member serves on major area paper, thesis, and/or doctoral committees within the university</p> <p>Faculty member directs undergraduate Honors Thesis</p> <p>Faculty member is actively engaged with students in activities such as advising, capstones, ePortfolios, supervising and managing practicum and internships, and career planning/development and/or other forms of student engagement appropriate to the faculty member's assignment</p>	<p>student success, engagement, mentoring, professional development, and advising, which may include:</p> <p>Average performance in facilitating student success, engagement, mentoring, professional development, and advising, which may include:</p> <p>Student ratings and/or narrative suggesting average accessibility/responsivity to and effective communication with students</p> <p>Meets minimum expectations for attending to feedback from students, but without substantive course revisions and/or articulated plan to assess the impact of those changes</p> <p>Faculty narrative reflecting student engagement that meets minimum expectations within the School.</p>	<p>Below average performance in facilitating student success, engagement, mentoring, professional development, and advising, which may be reflected in:</p> <p>Student ratings and/or narrative suggesting below average accessibility/responsivity to and effective communication with students</p> <p>Failing to meet minimum expectations within the School for attending to feedback from students</p> <p>Faculty narrative reflecting below average student engagement that fails to meet minimum expectations within the School.</p>	
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<p>Faculty member mentors students within their research “lab” and/or supervises student independent research</p> <p>Faculty member receives teaching awards/recognition</p>			
<p>SERVICE</p> <p>Service should generally be commensurate with the proportion of faculty duties assigned in the service category (e.g., productivity expectations for faculty with a 10% service assignment will be higher than for faculty with a 5% service assignment). No single indicator is necessary and may not be sufficient to warrant a given rating. Service activity will be evaluated holistically, not just based on the number of indicators.</p> <p>Being a well-rounded scholar and teacher includes making substantive service contributions to better the discipline, School, College, University, related professional fields, and the broader community. Faculty are encouraged to fully engage in the faculty governance process, as well as make significant contributions to the professional and academic communities served by the Zimmerman School. Substantive service should be related to the candidate’s scholarly and professional interests and be reflective of a commitment beyond teaching and research expectations. Leadership positions in any service capacity demonstrate an exceptional level of commitment and responsibility. Examples of service activities in each of five categories include but are not limited to:</p> <ol style="list-style-type: none"> 1. Zimmerman School of Advertising & Mass Communications Participation in departmental governance in the form of service on departmental standing and ad hoc committees and performance of related duties; advising student media organizations, event planning/participation, faculty search activities, etc. 2. College of Arts & Sciences Participation in the governance of the College of Arts & Sciences in the form of service on standing and ad hoc committees or on search committees for other departments; attendance at college convocations, assemblies, and other events. 3. University Participation in university governance in the form of service on standing and ad-hoc committees and councils; attendance at convocations, commencement ceremonies, and other events. 4. Profession Participation in the peer-review process; credited involvement in a scholarly journal or book series; administration of or regular contribution to a professional blog or newsletter; consulting for other department or institution; service as officer – or board or committee member – for a regional or national professional or scholarly society or association; serving as a consultant to media/communication organizations; responding to media inquiries, participating in media commentary to news organizations; participating in professional training or educational workshops interviews and offering; giving invited talks, seminars, panels, and presentations for the profession, students, university, or the general public. 5. Community Involvement in service-learning activities; participation in community outreach efforts; participation in local, regional, or national government or 			

civic organizations that capitalizes on faculty professional expertise.

Exceeds Expectations (1)	Meets Expectations (2)	Does Not Meet Expectations (3)	Unsatisfactory (4)
<p>Evidence of exceptional service activity for most years during the review period, considering indicators such as the following (typically two or more for “Exceeds Expectations”):</p> <p>Service activity both for the university and for the profession.</p> <p>Service activity in multiple roles or on multiple committees, or at multiple levels—i.e., university, college, and school</p> <p>Holding office or positions of professional distinction (e.g., journal editorships) in professional service.</p> <p>Engagement in high-priority, time-intensive service activities, e.g., busy committees, special task forces</p> <p>Serving in leadership roles in university and/or professional association committees</p> <p>School-related community engagement - e.g., presentations to or consulting for community, library, government organization and/or serving as officer or board member of civic organization.</p>	<p>Evidence of average service activity that meets minimum expectations within the School, typically comprising service activity in at least one domain—School, College, University, Profession—for most years during the review period.</p>	<p>No effective service activity or activity that is below minimum expectations within the School for most years during the review period.</p>	<p>No effective service activity at the level expected for the rank, for more than two years.</p>
<p>OVERALL PTR RATING</p>			

Based on the PTR assessment, an OVERALL rating will be assigned using the 4-point ordinal scale specified in USF’s Post-Tenure Review (PTR) regulation II(3)(c). This OVERALL rating will be a weighted total, derived by multiplying scores from each of the three evaluative domains (i.e., Research, Teaching, & Service) by the faculty member’s assignment percentage in that domain and using the sum of those figures, since that approach is most consistent with our annual evaluation system, as outlined in our governance documents.

Exceeds Expectations (1)	Meets Expectations (2)	Does Not Meet Expectations (3)	Unsatisfactory (4)
<p>A clear and significant level of accomplishment beyond the average performance of faculty across the faculty member’s discipline and unit. Performance is appreciably greater than the average college faculty member of the candidate’s present rank and field at top-tier research institutions. Must have a sustained and satisfactory professional conduct and performance of academic responsibilities and compliance with state law, Board of Governors’ regulations, and university regulations and policies.</p>	<p>1. Expected level of accomplishment compared to faculty across the faculty member’s discipline and unit. Sustained record commensurate with the academic standards of a top-tier research institution; evidence of at least a satisfactory performance rating in each annual evaluation during the previous 5 years and satisfactory or greater assessment in each area of assignment; sustained and satisfactory professional conduct and performance of academic responsibilities and compliance with state law, Board of Governors. Exceptions might be made to the general expectation that a faculty member achieve satisfactory or greater</p>	<p>Performance falls below the expected range of annual variation in performance compared to faculty across the faculty member’s discipline and unit but is capable of improvement. A faculty member who has received an overall unsatisfactory annual evaluation during one of the previous 5 years without evidence of a trajectory of subsequent improvement or exhibited unsatisfactory performance in any single area of assignment over multiple years or pattern of non-compliance with state law, Board of Governors’ regulations, and university regulations and policies may be deemed to not meet expectations.</p>	<p>Failure to meet expectations that reflects disregard or failure to follow previous advice or other efforts to provide correction or assistance, or performance that involves incompetence or misconduct as defined in university regulations and policies. A faculty member who has received an overall unsatisfactory annual evaluation during two or more of the previous 5 years or unsatisfactory performance in two or more areas of assignment over three of the last five years of the review period may be deemed unsatisfactory. Demonstrates a consistent pattern of failing to perform duties assigned by the University or sustained violations of applicable state and federal law and applicable published College, University, and Board of Governors regulations, policies, and procedures.</p>

	assessment in each area of assignment in each annual evaluation during the previous 5 years provided that the faculty member addresses any lower than satisfactory ratings received during the review period in the faculty narrative and provides sufficient explanation for any lower than satisfactory ratings and evidence of subsequent improvement.		
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