

- 1 UNIVERSITY OF OREGON MEDIATION PACKAGE PROPOSAL (3/25/2025)
- 2 UNIVERSITY OF OREGON MEDIATION PACKAGE PROPOSAL (3/13/2025)
- 3 UNIVERSITY OF OREGON MEDIATION PACKAGE PROPOSAL (3/3/2025.v2)
- 4 UNITED ACADEMICS MEDIATION PACKAGE PROPOSAL (3/3/2025)
- 5 UNIVERSITY OF OREGON MEDIATION PACKAGE PROPOSAL (3/3/2025)
- 6 UNIVERSITY OF OREGON FINAL OFFER PROPOSAL (2/25/2025)
- 7 UNIVERSITY OF OREGON PROPOSAL (4/18/2024)

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APPENDIX 2: UNIT POLICY DEVELOPMENT GUIDELINES

14 These guidelines are for new units or departments in their policy development and existing units
15 or departments in any unit-level policy revisions. Departments or units must follow the processes
16 in Article 4 to develop or revise their unit-level policies. These guidelines should be read
17 alongside ~~in-line with~~ the relevant articles.

Merit Review Policies:

21 Every unit will have a policy for distributing merit pool money to bargaining unit faculty
22 members who meet ~~or exceed~~ expectations for teaching; research, scholarship, and creative
23 activities; and service, in accordance with the unit’s Article 17 professional responsibilities
24 policy and individual faculty member’s assigned duties. Criteria for merit reviews are those
25 outlined in a department’s or unit’s review and promotion policies. ~~should be clear and~~
26 ~~consistent with those relevant to Article 19: Career Review and Promotion and Article 20:~~
27 ~~Tenure Review and Promotion.~~ Policies should describe how individual merit increases are
28 determined among faculty who meet expectations for merit raises, ~~it is expected that there will be~~
29 ~~different levels of accomplishment in teaching, scholarship and creative activities, and service~~
30 ~~that will correspond to different merit ratings in those categories and overall. the levels (meets or~~
31 ~~exceeds, etc.) are used in determining individual merit increases.~~ Merit distributions should be
32 given as a percentage of base salary, irrespective of FTE in any given review period, and not as a
33 flat dollar amount.

Professional Responsibilities Policies:

38 **Workload Expectations:** The faculty in each department or unit will maintain a written policy
39 for the assignment of professional responsibilities. Unit-level policies shall define a 1.0 FTE
40 workload for all instructional classifications, categories, and ranks employed by the department
41 or program and shall address how each of the following items contribute to the overall FTE.
42 Unit-level policies should reflect consideration for the equitable distribution of service across
43 faculty.

45 For non-instructional classifications and where Tenure-related, Career, or Limited Duration
46 faculty are not aligned with the unit-level 1.0 FTE workload expectations, specific job

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47 descriptions should be developed to address the particular workload of the bargaining unit
48 faculty member. Instructional faculty workloads will, in general, address the following:

- 49 a. Course load
- 50 b. Service expectations
- 51 c. Research, scholarship, and creative activity
- 52 d. Professional development related to teaching, research, and service
- 53 e. Undergraduate and graduate advising
- 54 f. Student contact and communication

55

56 **Assignment Considerations:** Workload policies should also describe a process for accounting
57 for individual faculty needs when assigning workload. Factors to consider include, but are not
58 limited to:

- 59 a. New course preparations
- 60 b. Balance of workload components based on faculty review, promotion and tenure,
61 professional development expectations and agenda for research, scholarship, and creative
62 activity
- 63 c. Administrative duties
- 64 d. Caregiving responsibilities at the request of the faculty member
- 65 e. Timing of activities (e.g., publication and grant deadlines, course load in given terms, and
66 promotion review dates)
- 67 f. Job description

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69

70 **Tenure, Review, and Promotion (Tenured and Tenure-Track):**

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72 Each department or unit policy must articulate discipline specific review and promotion criteria
73 within their review policies that clarify the expectations for faculty activity in research and
74 scholarship for each review specified below.

75

76 **Reviews, Tenure, and Promotion:** Each department's or unit's tenure-track and tenured review
77 criteria are intended to be consistent with those of other major research universities and shall
78 include expectations, including the proportional weights, for each of the following, as defined by
79 each department or unit:

80

- 81 a. Sustained high-quality, innovative research, scholarship, or creative work ~~/creative work~~
82 in the faculty member's discipline, demonstrated through a record of concrete,
83 accumulated research, scholarship, or creative work activity;
- 84 b. Effective, stimulating teaching that meets university-wide teaching standards established
85 by the University Senate, to the extent applicable, in courses taught and in contributions
86 to ensuring academic success for undergraduate and graduate students, as applicable;
- 87 c. Ongoing, responsible service and leadership to the faculty member's students and
88 department, the university, the community, and the faculty member's professional
89 discipline more broadly.

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93 Contributions to diversity, equity, and inclusion should be taken into account, as appropriate. ~~In~~
94 ~~each of the areas above, unit-level policies should include must consider and define contributions~~
95 ~~that demonstrably promote diversity, equity, and inclusion.~~

96
97 **Promotion to Full Professor:** The criteria for promotion from associate professor to professor
98 will consider the research, ~~scholarship, or creative work~~, teaching, and service by the candidate.
99 ~~Each of the three areas should include contributions that demonstrably promote~~ Contributions to
100 diversity, equity, and inclusion should be taken into account, as appropriate. ~~and contributions to~~
101 ~~the promotion of diversity, equity, and inclusion by the candidate.~~ Additionally, criteria must
102 require the candidate be recognized as an outstanding scholar or ~~creative practitioner~~ in their
103 field, at least at the national level, with a sustained high-quality, innovative, trajectory of
104 ~~research, scholarship, or creative work~~ ~~creative work~~, and require that the candidate have
105 engaged in significant service demonstrating leadership and commitment both within and outside
106 the candidate's department or unit.

107
108 **Post-Tenure Reviews:** Unit-level criteria must be consistent with Article 20, Section 38.

- 109
- 110 • ~~Third-year Post-Tenure Reviews~~ ~~and~~ must include a determination if the faculty member
111 meets ~~, exceeds,~~ or does not meet expectations in their assigned duties. In general, an
112 associate professor meets ~~or exceeds expectations~~ in a third-year review if they are on
113 track for a successful promotion to full professor. In general, a full professor will meet or
114 ~~exceed~~ expectations in a third-year review if they are on track to meet ~~or exceed~~
115 expectations in their next sixth-year major review.
 - 116 • ~~Sixth-year Post-Tenure Reviews~~ must include a determination if the faculty member
117 meets ~~, exceeds,~~ or does not meet expectations in their assigned duties.

118
119 Criteria for post-tenure reviews must recognize that the focus of a faculty member's professional
120 activities may shift over time. As tenured full professors move through their careers, however,
121 some may redirect their energies. Some may wish, for example, to devote proportionately more
122 time to research/~~creative work~~, teaching, advising, administration, and University service than
123 they did as assistant or associate professors. If that is the case and if the desired shift in balance is
124 consistent with the ~~academic program areas~~, department's, unit's, and college's needs, a balance
125 of activities not specified in the standard workload of the department or unit may be established
126 by a written agreement between the faculty member and the department and approved by the
127 appropriate dean and the Office of the Provost, as provided for in Article 17. Consequently,
128 expectations and goals for individual faculty members may be changed to reflect the resulting
129 balance of activities.

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132 **Review and Promotion (Career and Limited Duration):**

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134 The faculty in each department or unit that employs Career and Limited Duration faculty will
135 maintain written procedures and criteria for the review of Career and Limited Duration faculty,
136 which must comport with Article 19 and the general guidelines below. ~~Should a Career or~~
137 ~~Limited Duration faculty member choose not to engage in service work outside of their~~

138 appointment period, their reviews will not be negatively impacted.

139

140 Contributions to diversity, equity, and inclusion should be taken into account, as appropriate.

141 ~~Each of the areas below should consider contributions in teaching, research/creative work, and~~

142 ~~service that demonstrably promote diversity, equity, and inclusion. All faculty are expected to~~

143 ~~contribute to the University's goals regarding diversity, equity, and inclusion.~~ These

144 contributions may be in the areas of research/~~creative work~~, teaching, and service activities, as

145 appropriate given the faculty member's job duties. Each candidate for promotion and continuous

146 employment reviews should be evaluated on their own merits.

147

148 ***Instructional Career Performance Reviews:*** Criteria for Career instructional performance

149 reviews should reflect the following:

150 • To the extent applicable, in evaluating the performance of teaching, reviews must

151 consider at minimum information from Student Experience Surveys, peer review(s), and

152 the faculty member's Instructor Reflection surveys and/or teaching statements for the

153 review window. For instructional Career faculty, student experience surveys will be

154 offered for all courses with five or more students, which will be considered in light of the

155 response rate. Instructional Career faculty are expected to undergo at least one peer

156 review of teaching per review window. The department or unit will establish a time frame

157 for notification to the Career faculty member before a peer review is conducted.

158 • To the extent applicable, Career instructional faculty will be reviewed based on their

159 service. Service is defined in unit level rules and may include activities performed for the

160 unit, University, field, and community.

161 • To the extent applicable, Librarians will be reviewed for demonstrated achievement in

162 their professional roles in the Library.

163 • To the extent applicable, in evaluating the performance of required professional

164 development activities, the review will consider the availability of professional

165 development funds, opportunities for professional development, and the Career

166 instructional faculty member's efforts to secure funding (if applicable).

167 • To the extent applicable, the evaluation of scholarship, research, and creative activity will

168 include an assessment of work quality, impact on the field nationally and internationally,

169 and overall contribution to the discipline or program.

170

171 ***Instructional Limited Duration Faculty Performance Reviews:*** Units that employ instructional

172 faculty in Limited Duration classifications should establish a performance review framework for

173 limited duration faculty that aligns with the scope, duration, and duties of their appointments.

174 Performance reviews for limited duration faculty should, except in cases where units specify

175 otherwise, typically be informal and conducted annually.

176

177 ***Instructional Career Promotion and Continuous Employment Reviews:*** Criteria for promotion

178 and continuous employment reviews should reflect the general expectations appropriate to each

179 category and rank employed by the department or unit, which should be consistent with the

180 department's or unit's professional responsibilities policy and must allow for differentiation

181 based on the particular duties and position descriptions of review candidates. Generally, a

182 sustained record of excellence in the following areas, as appropriate, is expected:

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- 183 • Quality and versatility of teaching: Career instructional faculty must possess the ability to
184 teach effectively at multiple levels in undergraduate and/or graduate courses but will be
185 assessed on their effectiveness in the courses they have been assigned to teach.
- 186 • Service: Career instructional faculty will demonstrate regular participation in the business
187 of the department or unit and the University (e.g., committee work).
- 188 • Administrative Duties: Career instructional faculty will demonstrate evidence of
189 excellence in development and maintenance of any additional administrative duties
190 assigned to them beyond regular department service.
- 191 • Commitment to the profession: Career instructional faculty should demonstrate evidence
192 of professional activities that help them stay current in both course content and
193 instructional methodology. Other activities that promote professional growth are also
194 relevant (e.g., conference and workshop attendance, scholarly activities such as materials
195 development, development of assessment tools, etc.).
196

197 **Research Career Performance Reviews:** Criteria for Career research performance reviews
198 should reflect the following:

- 199 • Career research faculty will be reviewed to assess the quality of work performed and the
200 outcomes of their contributions to the research program. To the extent applicable, the
201 evaluation of scholarship, research, and creative activity will include an assessment of
202 work quality, impact on the field nationally and internationally, and overall contribution
203 to the discipline or program.
- 204 • As applicable, Career research faculty will be reviewed based on their service. Service is
205 defined in unit level rules and may include activities performed for the unit, University,
206 field, and community.
- 207 • As applicable, Career research faculty will be reviewed based on their performance of
208 required professional development activities, the review will consider the availability of
209 professional development funds, opportunities for professional development, and the
210 Career research faculty member's efforts to secure funding (if applicable).
211

212 **Research Limited Duration Faculty Performance Reviews:** Units that employ research faculty
213 in Limited Duration classifications should establish a performance review framework for limited
214 duration faculty that aligns with the scope, duration, and duties of their appointments. Review
215 considerations will typically mirror those of Career research faculty as appropriate.
216

217 **Research Career Promotion and Continuous Employment Reviews:** Criteria for promotion and
218 continuous employment reviews should reflect the general expectations appropriate to each
219 category and rank employed by the department or unit, which should be consistent with the
220 department or units' professional responsibilities policy and must allow for differentiation based
221 on the particular duties and position descriptions of review candidates. Position-specific criteria
222 will be based on the most important professional responsibilities as described in a faculty
223 member's position description to accommodate a wide range of research activities and
224 expectations. Evaluations of research faculty funded by sponsored projects will also reflect the
225 activities that they have been funded to do.
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228 **Summer Session Policies:**

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230 Every unit will have a policy for the appointment, professional responsibilities, course
231 cancelation, and compensation for Summer Session work. Appropriate programs, like Global
232 Education Oregon (GEO), may also implement summer session appointment policies. Programs
233 with summer session policies may also include rules with respect to compensation, appointment,
234 and budgeting.

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237 **Professional Development Policies:**

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239 Every unit will have a policy setting forth the procedures and criteria for applying for and/or
240 distributing available professional development funds. Policies must (a) provide that both Career
241 and Tenure-Track and Tenured bargaining unit faculty members are eligible to compete for
242 professional development funds and (b) comply with all provisions of the collective bargaining
243 agreement. Centers, institutes, or units not embedded in an academic unit and comprised of a
244 majority of funding-contingent faculty members are exempt from the unit-level professional
245 development policy requirements.

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248 **Internal Governance Policies:**

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250 Policies for internal governance must include provisions for appropriate documentation of
251 decisions and for the appropriate and equitable participation of faculty in the Tenure-Track and
252 Tenured and Career classifications in governance and the development of departmental or unit
253 policies.

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- a. The participation must be appropriate. Appropriate participation includes, but is not limited to, departmental activities such as unit meetings, voting, and committee membership. There must be documented and legitimate structural, pedagogical, or programmatic reasons for determining that a class of faculty (TTF or Career), a particular classification, a particular rank, or a particular FTE level should not participate in a particular aspect of governance.

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- b. When participation is appropriate, it must also be equitable. Equitable participation requires a level of parity that allows TTF and Career faculty in a department or unit to have a meaningful role in governance. Equitable participation does not mean that governance roles for every faculty member must be exactly the same or that there must be absolute proportionality in governance for all faculty classifications and ranks.

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- c. Career faculty whose teaching is primarily at the undergraduate level (e.g. instructors) may participate and vote on undergraduate curricular matters. Career faculty whose teaching is primarily at the graduate level (e.g. lecturers) may participate and vote on graduate curricular matters. Career faculty whose teaching is routinely at both levels, may participate and vote at both levels.