



UNIVERSITY OF
CALGARY

CUMMING SCHOOL OF MEDICINE

FACULTY GUIDELINES (ACADEMIC STAFF CRITERIA)

MAY 2023

(Approved by CSM Faculty Council, May 2, 2023)
(Approved by Provost July 18, 2023)

**Containing Criteria for Appointment, Renewal,
Transfer, Tenure, Promotion, and Merit
Assessment for Academic Staff**

under the authority of

***GFC Academic Staff Criteria &
Processes Handbook
(June 2021 version)***

Note: Revision of this CSM document is underway
to align it with the July 2023 Handbook

Background

This CSM document was created under the authority of the *GFC Academic Staff Criteria & Processes Handbook* (the “Handbook”) and providing annotations which describe how the articles in the Handbook will be applied within CSM.

Items enclosed within boxes represent the proposals from the Criteria Working Group to provide context and detail for how the articles within the Handbook are to be interpreted and applied in CSM.

The draft version of this CSM document was presented at CSM Faculty Council on June 2, 2021. Academic staff members of CSM were given the opportunity to provide anonymous feedback on this document through a survey platform over the subsequent two months.

Feedback was reviewed and incorporated in the development of this draft.

Notes:

The Cumming School of Medicine (CSM) Guidelines have been created by providing CSM-specific guidance related to the content of the *GFC Academic Staff Criteria & Processes Handbook*, following the numbering of the *Handbook*. CSM-specific guidance (called “CSM Annotations”) has been provided as text boxes. In the event an unintended conflict or contradiction arises between the CSM-specific guidance and the *Handbook*, the *Handbook* content shall prevail.

Please note that in this document “University” and “the University” refers to the University of Calgary. “CSM” refers to the Cumming School of Medicine at the University of Calgary.

These CSM guidelines will be regularly updated in accordance with updates to the *GFC Handbook*. Technical/wording updates will be drafted within 6 weeks of receiving such updates to the *GFC Handbook*. Substantive updates to the *Handbook* will be addressed within drafts prepared within 3 months of receiving such updates. Major revisions to the *Handbook* will be addressed through a renewal process customized to the nature of such major revisions. The Office of Faculty Development and Performance will coordinate such revisions.

CSM Criteria Working Group (2020-2023)

The working group was formed in the summer of 2020 including members from junior, middle and senior academic ranks. By the time of this document's formal approval in 2023, some of these members had been promoted to their next rank.

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The Criteria Working Group thanks Valerie Taylor for her contributions to the Research and Scholarship Activities Framework Development Team, Kenna-Kelly Turner for her guidance on portions of this document and her lead role in developing the CSM Equity Framework, and Danielle Kiss for her administrative support and copy-editing of this document.

Preamble

CSM Preamble Annotation

Equity, diversity, inclusion more broadly, and where they intersect with areas such as accessibility, anti-racism, and decolonization, all serve to strengthen education and research environments and improve the quality, relevance and impact of education and research. In this document, a variety of equity-related terms are used. We recognize the limits of equity-related descriptions and categorizations given that meaning evolves across time, geography, social structures, and in accordance with the goals and lived experiences of those employing the language. CSM recognizes this issue and commits to reviewing the language employed in this document on a regular basis to ensure it reflects current day respect to all.

Criteria in this document are to be applied consistently for all current and prospective academic staff members, recognizing the structural and systemic barriers they may have faced, and contextualized to each individual in accordance with these barriers and their scholarly field, professional journey, workload assignment, rank and stream as described in detail in relevant sections below.

PART A

Definitions, Authority, Faculty Guidelines, Transitional Provision

2. Authority and General Considerations

CSM Annotation A.2.4

This document aligns previous CSM criteria terminology with those of the *Handbook*. Specifically, what was previously known as “Research, Scholarship and Creative Activity” is now referred to as “Research & Scholarship”, and what has been generally referred to as “Education” is now referred to as “Teaching”. Similarly, those previously known as “Geographic Full Time” or “GFTs” are now referred to as “academic staff members”.

3. Faculty Guidelines

CSM Annotation A.3.1

This annotated version of the *Handbook* serves as the CSM Faculty Guidelines referred to in this article.

CSM Annotation A.3.7.i.

Research & Scholarship, Teaching, and Service (including Clinical Service, when relevant) are Core Academic Pillars of CSM and are elaborated upon in their respective sections below. Accomplishments in Core Academic Pillars are valued equally and assessed relative to an academic staff member’s workload assignment for each pillar. For example, achievements in Research and Scholarship will be more important for an academic staff member with a high workload assignment for Research and Scholarship than for an academic staff member with a low workload assignment for Research and Scholarship.

CSM Annotation A.3.7.ii.

These interpretations are described in the relevant sections below.

CSM Annotation A.3.7.iii.

CSM values knowledge engagement and transfer, entrepreneurship, innovation, and community engagement arising from Research and Scholarship, Teaching and Service. Academic staff members should report such activities and make connections to the relevant Core Academic Pillars as appropriate. These themes are not routinely expected types of academic contributions by academic staff members. Contributions to these themes would be according to their relevance to the scholarly work and workload assignment of each academic staff member.

CSM Annotation A.3.7.iv.

The weighting of the activities outlined in i), ii), and iii) above will be judged in the light of the academic staff member’s workload assignment for such activities.

CSM Annotation A.3.7.v.

Academic staff members are expected to seek and secure funding and other resources relevant to their fields of Research and Scholarship, if required and in relation to their workload assignment.

CSM Annotation A.3.7.vi.

Clinical Service is assessed as a third major category of Service, as described below. CSM review of clinical service is generally limited to whether such academic staff members have met their patient care requirements according to their workload assignment for clinical service, and their engagement in other activities related to clinical work, including participation in patient safety and quality improvement activities. Other professional responsibilities would normally be assessed as part of Service External to the University, as described below.

CSM Annotation A.3.7.vii.

Assessment of contributions to service is described in Service, below. Administrative duties are normally considered as contributions to service. At times, an academic staff member's workload assignment to a leadership role may occur through either the Teaching or Research and Scholarship pillar. In such cases, administrative contributions will be assessed through the pillar in which the time for the role was allocated.

CSM Annotation A.3.7.viii.

Information supplied within a Teaching Dossier will be assessed in relation to an academic staff member's workload assignment for Teaching.

CSM Annotation A.3.7.ix.

Academic staff members should report Research and Scholarship in progress. Academic staff members should take care to identify the ongoing status of such works to enable any persons or groups reviewing them to properly situate such works in progress within each academic staff member's scholarly context. In some fields, Research and Scholarship require prolonged time periods to reach full development; in such cases, the achievement of key milestones within such work in progress (as discussed with one's Department Head) will generally receive credit or recognition during Merit Assessment and/or Promotion.

CSM Annotation A.3.7.x.

The quality and impact of accomplishments in all three Core Academic Pillars as determined within a scholar's discipline and relative to a scholar's context should normally increase as an academic staff members progress through and within the ranks.

CSM Annotation A.3.7.xi.

This is described in CSM Annotation B.2.1.1 below.

CSM Annotation A.3.7.xii.

This is described in relevant sections below.

CSM Annotation A.3.7.xiii.

There is no standard workload assignment for academic staff members in CSM nor within departments. Criteria in the document are to be contextualized to each academic staff member as described in the CSM Preamble Annotation at the beginning of this document.

CSM Annotation A.3.7.xiv.

Activities conducted outside CSM and as agreed to by one's Department Head as part of the academic staff member's workload assignment will be valued equally to similar contributions within CSM. It is generally expected that academic staff members make academic contributions within CSM beyond their primary Department. At the same time, academic staff members are expected to contribute to departmental activities as required, thereby demonstrating citizenship and collaboration.

CSM Annotation A.3.7.xv.

CSM recognizes and values that academic staff members have diverse career patterns. Criteria in this document are to be contextualized to each academic staff member, enabling inclusive evaluation of their contributions and career progression.

CSM Annotation A.3.7.xvi.

CSM recognizes that longstanding systemic barriers and biases (based on sex, gender, identity, ethnicity, diverse abilities, and other factors) in academic health sciences may have impaired career progression and reduced (or absent) recognition through merit assessment, promotion and related processes. Through this document's development and implementation, CSM aspires to disrupt and replace such barriers with criteria which respect and appropriately recognize all forms of academic excellence. Considering these criteria, as described in the CSM Preamble Annotation above, is critical in framing the academic contributions within the context of structural discrimination academic staff members may have experienced.

The CSM Preamble Annotation (at the start of this document) and the *Equity Framework* approved at the November 16, 2022, CSM Faculty Council are important tools to help evaluators recognize and account for structural discrimination in their assessments of academic excellence.

CSM Annotation A.3.7.xvii.

This detail is found in Part C below.

CSM Annotation A.3.7.xviii.

This detail is found in Part C below.

CSM Annotation A.3.7.xix.

This detail is found in Part C below.

PART B

Criteria for Appointment, Renewal, Transfer, Tenure, Promotion, and Merit Assessment

1. Criteria for Research and Scholarship, Teaching, and Service

CSM Annotation B.1
The range of metrics and indicators recommended by DORA should be used to assess Research and Scholarship.

1.1 General Considerations

CSM Annotation B.1.1.1
CSM highly values work academic staff members engage in to facilitate equity, diversity and inclusion, including activities which help CSM and society respond to the *Calls to Action* of the *Truth and Reconciliation Commission*, and activities which advance the interests of members of the equity-deserving groups identified by the University of Calgary which include *women, Indigenous peoples, visible/racialized minorities, persons with disabilities, and members of the 2SLGBTQ+ community*. Discrimination against these equity-deserving groups causes harm to and negatively impacts the careers of those experiencing discrimination and injures the academic climate.

CSM does not tolerate hateful and/or discriminatory acts and, in particular, does not tolerate actions which are racist, sexist, and/or are discriminatory toward people with disabilities or members of the 2SLGBTQ+ community. Discriminatory activities against members of these equity-deserving groups will be addressed through relevant existing UCalgary processes and policies. CSM commits to faculty development in anti-oppression and due process and support for reporting and investigating complaints about discriminatory acts.

CSM values contributions by academic staff members which remove structural discrimination and/or advance equity, diversity and inclusion.

These contributions will be considered under Service, as described in CSM Annotation B.1.4.1 below.

CSM Annotation B.1.1.2
Clinical and other professional activities and/or duties which have been agreed to by an academic staff member’s Department Head as part of their assigned workload are generally considered under Service below.

CSM Annotation B.1.1.3
The nature of Research and Scholarship, Teaching, and Service may vary among Departments and individual academic staff members according to strategic plans of CSM, Departments, Institutes, programs, and academic staff members’ scholarly fields and workload assignment.

CSM Annotation B.1.1.4

Certain types of academic contributions require careful development and maintenance of community relationships (including Indigenous, racialized and other populations) which demand significant time, focus and engagement. As a result, academic outcomes may not be immediately apparent, and may be in forms which vary from those traditionally recognized by the University. Additionally, high-quality community-engaged research includes ongoing engagement following completion of anticipated academic initiatives.

Accordingly, any review or assessment of such activities will be conducted recognizing the required investment of time in community relationships during all phases of community-engaged research and scholarship.

1.2 Research and Scholarship

CSM Annotation B.1.2.2

Research and Scholarship activities will vary by field. CSM generally asks that academic staff describe their Research and Scholarship activities using the following inclusive categories.

1. Relational Engagement with Communities and Patients
 - a. Community Building, Developing Research Capacity
 - b. Partnerships with Communities
 - c. Social Equity and Community Engaged Research
 - d. Research Impact on Policy, Practice and Structural Change
 - e. Indigenous Scholarship - Knowledge creation, research, and scholarship grounded in or engaged with Indigenous nations, communities, societies or individuals that embraces the intellectual, physical, emotional and/or spiritual dimensions of knowledge and interconnected relationships with people, places and the natural environment, including knowledge exchange and Ceremony, all grounded within an Ethical Space of Engagement approach.* [Emine W. (2003). The ethical space of engagement. *Indigenous Law Journal*, 6(1), 193-203.]

2. Professional Innovation and Entrepreneurship
 - a. Patents /Licenses
 - b. Commercialization of Technology
 - c. Social Entrepreneurship
 - d. Social Innovation (e.g. Innovate Calgary)
 - e. Software Creation
 - f. Development of Methods and Techniques
 - g. Partnerships with Industry

h. Development of Academic/Educational Resources (e.g. open educational resources, handbooks, guides, manuals, etc.) *Note: At times, it may be more appropriate for an academic staff member to report such resource contributions under Teaching. It is important for academic staff to report any one product in a single location.*

3. Funding and Resources

- a. Successful Acquisition of Grant Funding
(note: sources and amounts of funding are discipline-specific)
 - i. Competitive
 - 1. Tri-council
 - 2. Non-Tri-council
 - ii. Non-competitive
- b. Research Contracts
- c. Clinical Trials
- d. Multi-Authored Grant
- e. Industry Sponsored Research
- f. Philanthropy

4. Knowledge Exchange and Dissemination

(note: quantity and quality measures are discipline-specific)

- a. Peer-Reviewed Publications
 - i. Articles
 - ii. Abstracts
 - iii. Case reports
 - iv. Other
- b. Non-Peer-Reviewed Publications
- c. Presentations
 - i. Invited / Keynote presentations
 - ii. Peer-reviewed presentations
 - iii. Non-peer-reviewed presentations
- d. Additional Publications
 - i. Books, chapters (author, editor)
 - ii. Educational development (evaluation studies, policy briefs and reports, position papers on teaching and learning)
- e. Creation of Data Sets
- f. Results from Clinical Trials
- g. Research outputs that inform clinical practice, health guidelines or health system changes

5. Leadership in Research and Scholarship

- a. Leadership Role in Fostering Research and Scholarship – Formal (e.g. Institute

- Directors, Research Group Leads (departmental, institute)
- b. Informal Research and Scholarship Leadership Positions
- c. Research and Scholarship Leadership in the Discipline
- d. Positive Contributions to Research and Scholarship Team Environment

6. Creative Professional Activity

(including knowledge translation and exchange outside the academy; activities must have a basis in the academic staff member’s research and scholarship area)

- a. Scholarly Products to Share Knowledge (i.e. documents, briefs, summary reviews, etc., created to support analysis and policy development)
- b. Contributions to the Development of Professional Practices – Leadership in Professional Organizations, Government or Regulatory Agencies
Note: At times, these activities might better be described under Service (external to the University). It is important for academic staff to report any one activity in a single location.
- c. Media Engagement (social media engagement, expert advice, media interviews)
- d. Creation of Media (blogs, websites, videos, etc.)
- e. Engagement/Outreach (e.g. speaking at community events)
- f. Community Reports

Research and Scholarship activities will also vary by workload assignments. CSM has defined the following four main workload assignments for Research and Scholarship and the respective anticipated levels of contributions:

≤ 15%	Participant	Collaborator or team member. May be included as collaborator or co-investigator. Expectations: contributions in one of the above categories.
20-40%	Contributor	Depending on the discipline, may have an independent research program or may be involved in a collaboration as a team member. Expectations: contributions in two of the above categories, usually including Category 4.
45-60%	Major Contributor	Have developed their own independent research program or play a critical role in a team. Expectations: peer-reviewed outputs in Category 4 and contributions in two other categories.

<p>>60% Leader in Research and Scholarship</p>	<p>Have their own independent Research Program as well as promote teamwork and collaboration, given the importance of team science. Regular and sustained Knowledge Exchange and Dissemination AND communication/outreach to the academic, healthcare, professional or stakeholder community depending on the nature of the research - can include "traditional" and "non-traditional" communication methods.</p> <p>Expectations: peer-reviewed outputs in Category 4 and substantial contributions in at least two other categories.</p>
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CSM Annotation B.1.2.6

In their particular fields of endeavor, academic staff members are required to meet ethical standards for Research and Scholarship, to adhere to University policies (and those of the College of Physicians and Surgeons where relevant) with respect to ethical conduct, and to act with integrity and honesty in conducting and communicating their Research and Scholarship

CSM Annotation B.1.2.7

Academic staff members are expected to seek and secure funding and other resources relevant to their fields of Research and Scholarship, as required.

CSM Annotation B.1.2.9

- (a) Clinical Service is officially considered as a third category of Service, below. Notwithstanding, for clarity and ease, it is usual CSM practice for a clinician academic staff member's workload assignment for Clinical Service to be indicated as a fourth "Pillar" entitled "Clinical".
- (b) The range of contributions to one's professional discipline can include activities from any of the categories in B.1.2.2. Examples include development of policies and procedures which are used by other organizations, creation of knowledge translation resources such as point-of-care tools, and foundational relationship work with defined patient communities leading to Research and Scholarship.
- (c) Contributions to one's discipline which are not aligned with any of the categories in B.1.2.2 above are generally considered as contributions to either Teaching or Service. Academic staff members requiring clarity on where and how to report contributions to one's professional discipline should consult with their respective Department Heads.

1.3 Teaching

CSM Annotation B.1.3.1

- (a) Teaching is a major CSM function. CSM's purpose of Teaching is to facilitate learning, to guide the next generation of learners on their educational path, and to facilitate life-long learning of people within the health sciences.
- (b) All academic staff with a workload assignment in Teaching are expected to make contributions to the Teaching mission of CSM in proportion to their workload assignment. An academic staff member's contributions to, and achievements within, Teaching are to be assessed in total and in keeping with their workload assignment for Teaching and rank.
- (c) The numbers of students, type and quantity of assessments, context of academic field, student level, session preparation and many other factors will impact the time required to teach and lead courses and programs, sometimes in significant ways.
- (d) The time required to supervise research students varies by context, stage of training, mix of research learners, and other factors. As the number of research learners increase in a research environment, supervision among the students develops, usually leading to a non-linear increase in total FTE required by the academic staff member to supervise their research student cohort.
- (e) CSM generally asks that academic staff describe their Teaching activities using the following inclusive categories:
 1. Instruction and Assessment
 - a. Instruction (direct teaching, scheduled teaching, etc.)
 - b. Learner Assessment and Review
 - i. Examinations, grading and other assessments of students/learners
 - ii. File review and interviewing
 2. Supervision, Mentorship and Student Engagement
 - a. Research Supervision
 - b. Clinical Workplace-Based Education
 - i. Activities in the moment
 - ii. Activities over time
 - c. Mentorship and Advising Activities
 - i. students / learners
 - ii. peers
 - d. Student/Learner Engagement (e.g. student-driven group activities, developing student engagement programs which are oriented to the needs of students)
 3. Teaching Development
 - a. Personal Teaching Improvement
 - b. Peer Teaching Improvement

Note: activities in helping peers develop their teaching skills which are beyond

the norm might better be reported under 4. Educational Leadership below.

4. Educational Leadership

- a. Defined Leadership Roles
- b. Curriculum Consultation, Development and Implementation
- c. Program Evaluation and Accreditation
- d. Contributions to Policy and Governance of Education

(f) Teaching activities will vary by workload assignments. Increasing workload assignment in Teaching results in increased expectations for Teaching contributions. All academic staff are expected to make contributions in either Category 1 or 2 above. Academic staff are expected to provide learner-centred instruction and supervision within these activities. In general, academic staff with >10% of Teaching workload assignment beyond their assigned activities in Categories 1 and 2 above are expected to make contributions in Categories 3 and 4.

CSM Annotation B.1.3.3

Teaching may take different forms such as direct or classroom instruction, inquiry-based teaching, laboratory teaching, competency-based teaching, clinical workplace-based education, field and practicum supervision, research supervision or co-supervision, mentorship, assessment design and marking, and program evaluation. Teaching may occur at undergraduate, graduate, postgraduate, and professional development levels.

Time spent in clinical care with clinical learners is considered a Service contribution, as the workload assignment for clinical care is part of Service. Time spent in Teaching activities of clinical learners outside scheduled clinical care (such as acting as a Competency Based Medical Education (CBME) coach, reviewing and consolidating feedback and assessments completed by clinical preceptors, development of individualized learning plans, are scheduled direct observation of a learner's clinical performance in patient care) is considered as a Teaching contribution. Supervision of remedial or probationary learners is recognized to require substantial additional effort and time.

CSM Annotation B.1.3.6

Educational leadership and scholarship are highly valued by CSM.

In general, pedagogical innovations that are shared beyond an academic staff member's teaching and learning environment should be considered contributions to Research and Scholarship. Similarly, the "sharing of pedagogical expertise through publications" described in Section B.1.3.6 above and related types of educational scholarship would normally be reported within Research and Scholarship. Specifically, publications of educational research are normally reported under Knowledge Exchange and Dissemination (Category 4 in CSM Annotation B.1.2.2 above). Funding for such work is normally described under Funding and Resources (Category 3

in CSM Annotation B.1.2.2 above). Any individual publication may only be reported within a single pillar.

1.4 Service

CSM Annotation B.1.4.1

The responsibility described in Section B.1.1.1 above (for all academic staff members to contribute to a climate in which diversities of opinion and views are valued) will be considered within Service as service of citizenship

CSM generally asks academic staff members to describe their Service activities within the following categories:

1. Internal to the University
 - a. Service of Citizenship

All academic staff are required to contribute to an inclusive, collegial and safe climate in which diversities of opinion and views are valued.
 - b. Administrative Leadership Roles
 - i. Department
 - ii. Institute
 - iii. CSM-wide (program, core facility, office, etc.)
 - iv. University of Calgary-wide roles (e.g. roles in the VPR or Provost's Offices)
 - v. AHS Calgary Zone roles (including Section leadership)
 - c. Committees, Task Forces, etc.
 - i. Service as Chair/Co-Chair
 - ii. Service as Member
 - d. Multi-Institutional and Collaborative Projects

(note: when participation is primarily as a representative of the University of Calgary, it is appropriate to identify it here. When one's role is leading or co-leading such projects, it would generally be identified as an External Service activity.)
 - e. Policy and Process Development

(note: policies, processes and other tools which have been disseminated and are used at other institutions should be reported under Research and Scholarship)
 - f. Additional Internal Service Contributions
2. External to the University

Service external to the University may be local, regional, provincial, national, and/or international.

 - a. Grant Reviews, Panels, etc.
 - b. Journals and Publication Platforms

- i. Editorial roles
 - ii. Review roles
 - c. Work with Organizations
 - i. Type of activity (e.g. Board or Committee membership)
 - ii. Impact of activity
 - iii. Scope of organization
 - d. Service to Government
 - e. Community Service
(i.e. arising from or connected to the academic staff member's academic appointment)
- 3. Clinical service (when relevant)
 - a. Clinical practice
 - b. Active participation in continuing medical education, professional development, and personal quality improvement
 - c. Development of local innovations to improve clinical care (Innovations which are disseminated and have impact beyond an academic staff member's own patient cohort should be reported in Research and Scholarship.)
 - d. Contributions to institutional/clinic patient safety and quality management programs

4. Voluntary activities and elective community engagement.

While not generally relied upon to account for time allocated to Service, except as agreed to by their respective department heads, CSM encourages volunteer and community engagement by academic staff members as such activities can be meaningful for members and strengthen our communities.

Community engagement which has been deemed part of their workload assignment should be reported in the relevant categories within Research and Scholarship.

CSM Annotation B.1.4.2

Workload Assignment for Service varies by department and scholarly context. Academic staff members are expected to contribute to Service in proportion to Workload Assignment and in activities agreed upon by their Department Head. Clinician academic staff members will generally have substantial clinical responsibilities leading to a large allocation of time for Service. Expectations regarding quality, scope and impact generally increase with rank. Academic staff members in administrative leadership roles will generally have large workload assignments for service. It is recognized that some Service contributions require significant background time.

CSM Annotation B.1.4.4

(a) The organization of conferences, seminar series, workshops or short courses may be reported as

Service (when the workload assignment for such activity is within Service), Teaching (when the workload assignment for such activity is within Teaching), or Research and Scholarship (when the workload assignment for such activity is within Research and Scholarship)

- (b) Teaching or facilitating such educational activities (and the time spent in preparation and related activities for such sessions) is generally reported under Teaching.
- (c) Presentations, seminars, etc., which are invited or occur as part of conferences, particularly those which included a submission and peer-review process, are generally reported as presentations under Research and Scholarship.

CSM Annotation B.1.4.5

- (a) Without limiting the scholarly autonomy of academic staff members to act on appropriate opportunities for community engagement, such activities are to be discussed with and agreed to by their respective Department Heads when the academic staff member is anticipating credit for such work.
- (b) In general, community Service contributions which arise due to an academic staff member's scholarly work and expertise are recognized during assessment, promotion and tenure processes. Elective community Service contributions which are not primarily connected to an academic staff member's scholarly work and expertise (such as coaching their child's soccer team) are laudatory and are recognized as volunteer contributions and not considered in how an academic staff member utilized their allocated Service time.
- (c) Media engagement (such as interviews with news agencies) are to be reported in Research and Scholarship.

CSM Annotation B.1.4.6

- (a) Academic staff members with similar workload assignments for Service are expected to increase the quality, impact, and/or scope of their Service contributions as they progress through and within the ranks.
- (b) Provincial, national and international leadership roles are generally encouraged for academic staff members to pursue, as part of discussions and agreements with their respective Department Heads.

1.5 Administrative Duties

CSM Annotation B.1.5

Administrative duties and leadership are generally recognized under Service (Internal to the University of Calgary). When an academic staff member's workload assignment for administrative duties and leadership is in either Teaching or Research and Scholarship, the activities are to be reported under that pillar.

2. Requirements for Academic Staff Ranks and Streams

2.1 General Considerations

CSM Annotation B.2.1.1

To be considered for appointment in the Cumming School of Medicine, a candidate shall normally hold at least one of a PhD (or its equivalent) or MD (or its equivalent). Under exceptional circumstances, individuals holding other graduate degrees and/or critical experience and expertise will be considered for appointment.

CSM Annotation B.2.1.2

Academic staff will be reviewed for Appointment, Promotion, Tenure, Transfer, and Merit Assessment according to the quality and impact of their academic contributions as a whole, in the context of their workload assignment to each Core Academic Pillar and their personal and scholarly contexts.

Should any reviewers or assessors of a candidate/academic staff member's files have concerns about contributions and/or achievements, they should explore whether structural barriers and/or discrimination are underlying causes and take them into account when assessing files. The Equity Framework in *CSM Academic Activity Frameworks 2022* can provide insight into such situations. Concerns related to academic integrity or other misconduct are to be addressed through relevant existing processes.

2.2 Requirements for Assistant Professor

CSM Annotation B.2.2.1

A candidate must have evidence or promise of scholarly achievements as well as promise of future development as a scholar.

2.3 Requirements for Associate Professor

CSM Annotation B.2.3.1

Appointment at, or promotion to, the rank of Associate Professor requires evidence of high-quality scholarly contributions in alignment with the academic staff member's existing (or in the case of a candidate, proposed) workload assignment.

CSM Annotation B.2.3.2

Additional examples include:

- substantial and senior contributions to curriculum development and governance locally;
- substantial and senior contributions to CSM and/or other local administration and/or Service;
- participation in educational networks, consortia, or multi-institutional or national/international curriculum teams;
- participation in administrative networks, consortia, or teams.

CSM Annotation B.2.3.3

The Research and Scholarship contributions by a candidate for promotion to the rank of Associate Professor are to be assessed in relation to the academic staff member's workload assignment for Research and Scholarship and contextualized to the academic staff member's personal and scholarly context.

The Research and Scholarship contributions by a candidate for appointment to the rank of Associate Professor are to be assessed in relation to the anticipated academic staff member's workload assignment for Research and Scholarship and contextualized to the academic staff member's personal and scholarly context.

CSM Annotation B.2.3.4

The Teaching contributions by a candidate for promotion to the rank of Associate Professor are to be assessed in relation to the academic staff member's workload assignment for Teaching and contextualized to the academic staff member's personal and scholarly context.

The Teaching contributions by a candidate for appointment to the rank of Associate Professor are to be assessed in relation to the anticipated academic staff member's workload assignment for Teaching and contextualized to the academic staff member's personal and scholarly context.

CSM Annotation B.2.3.5

The Service contributions by a candidate for promotion to the rank of Associate Professor are to be assessed in relation to the academic staff member's workload assignment for Service and contextualized to the academic staff member's personal and scholarly context.

The Service contributions by a candidate for appointment to the rank of Associate Professor are to be assessed in relation to the anticipated academic staff member's workload assignment for Service and contextualized to the academic staff member's personal and scholarly context.

2.4 Requirements for Professor

CSM Annotation B.2.4.1

Additional examples include:

- outstanding and high-impact contributions to instruction, curriculum development and governance locally;
- outstanding and high-impact contributions to CSM and/or other local administration and/or Service;
- participation in internationally known educational networks, consortia or teams;
- participation in internationally known administrative networks, consortia or teams.

CSM Annotation B.2.4.3

In reviewing a candidate for appointment at, or promotion to, the rank of Professor, their contributions to Research and Scholarship will be considered within the context of their workload assignment for Research and Scholarship, and their personal and scholarly contexts.

CSM Annotation B.2.4.4

In reviewing a candidate for appointment at, or promotion to, the rank of Professor, their contributions to Teaching will be considered within the context of their workload assignment for Teaching, and their personal and scholarly contexts.

CSM Annotation B.2.4.5

In reviewing a candidate for appointment at, or promotion to, the rank of Professor, their contributions to Service will be considered within the context of their workload assignment for Service, and their personal and scholarly contexts.

2.6 Requirements for Associate Professor (Teaching)

CSM Annotation B.2.6.1

In reviewing a candidate for appointment at, or promotion to, the rank of Associate Professor (Teaching), their contributions to Teaching and Research and Scholarship will be considered within the context of their workload assignment for Teaching and Research and Scholarship, and their personal and scholarly contexts.

CSM Annotation B.2.6.3

In reviewing a candidate for appointment at, or promotion to, the rank of Associate Professor (Teaching), their contributions to Service will be considered within the context of their workload assignment for Service and their personal and scholarly contexts.

2.7 Requirements for Professor (Teaching)

CSM Annotation B.2.7.1

In reviewing a candidate for appointment at, or promotion to, the rank of Professor (Teaching), their contributions to Teaching and Research and Scholarship will be considered within the context of their workload assignment for Teaching and Research and Scholarship and their personal and scholarly contexts.

CSM Annotation B.2.7.3

In reviewing a candidate for appointment at, or promotion to, the rank of Teaching Professor, their contributions to Service will be considered within the context of their workload assignment for Service, and their personal and scholarly contexts.

3. Criteria for Renewal, Tenure and Promotion

3.1 General Considerations

CSM Annotation B.3.1.2

Members of the CSM Faculty Tenure and Promotions Committee (FTPC) are to consider the relevant criteria in accordance with each individual's personal context (including recognition of structural barriers), scholarly field context, workload assignment and assigned duties, rank and stream.

4. Criteria for Merit Assessment

4.1 General Considerations

CSM Annotation B.4.1.1

The Head or equivalent are to contextualize the relevant criteria in accordance with each individual's personal context (including recognition of structural barriers), scholarly field context, workload assignment and assigned duties, rank and stream.

CSM Annotation B.4.1.10

For clarity, activities provided within the Academic Medicine and Health Services Plan are not Outside Professional Activities.

4.2 Criteria for Assessing Research and Scholarship Activities

CSM Annotation B.4.2.1

The Research and Scholarship contributions are to be assessed in relation to the academic staff member's workload assignment for Research and Scholarship and contextualized to the academic staff member's personal and scholarly context.

CSM Annotation B.4.2.3

- (a) Research and Scholarship in progress are evidence of ongoing engagement within their scholarly field(s).
- (b) Each publication will be recognized as having been published once. If an article was published electronically and claimed within one Merit Assessment reporting period, and published in print in the subsequent Merit Assessment reporting period, the publication will "count" once.

4.3 Criteria for Assessing Teaching Activities

CSM Annotation B.4.3.4

Teaching contributions are to be assessed in relation to the academic staff member's workload assignment for Teaching and contextualized to the academic staff member's personal and scholarly context.

4.4 Criteria for Assessing Service Activities

CSM Annotation B.4.4.2

Service contributions are to be assessed in relation to the academic staff member's workload assignment for Service and contextualized to the academic staff member's personal and scholarly context.

PART C

Academic Appointments Selection Procedures, Position Posting, Expedited Procedures for Spousal and Strategic Hiring, Equitable and Inclusive Hiring Initiatives

2. Position Posting

CSM Annotation C.2.1

The relevant Department Head and/or the Chair of the selection committee is responsible for drafting a position posting, using provided templates.

3. Selection Procedures for Continuing Academic Appointments – Teaching and Research

3.1 Academic Appointments Selection Committee Composition

CSM Annotation C.3.1.1

Members of the Academic Appointment Selection Committee are appointed by the Department Head and/or Chair of the selection committee. The proposed membership is reviewed by the Dean's Office to ensure it meets the criteria set out in the GFC Handbook and modifications are made by the Dean as required.

CSM Annotation C.3.1.2.ii.

The Chair of the selection committee appoints three to five voting members from the Continuing, Limited Term and Contingent Term academic staff members of the Home Unit, with a majority of these members holding a Continuing appointment.

CSM Annotation C.3.1.2.iii.

The Chair of the selection committee appoints at least one voting member who holds an appointment as an academic staff member within the Faculty but is outside the affected discipline or Department, as applicable.

CSM Annotation C.3.1.2.iv.

The Chair of the selection committee appoints at least one voting member from outside the Faculty and any applicable Conjoint Unit.

CSM Annotation C.3.1.2.v.

Student/trainee members of selection committees have voting status.

CSM Annotation C.3.1.2.vi.

Non-academic staff members of selection committees have voting status.