

TIPS FOR UPDATING PATTERNS OF ADMINISTRATION AND APPOINTMENTS, PROMOTION AND TENURE DOCUMENTS

Big Picture

- The templates for Ohio State Patterns of Administration (POA) and Appointments, Promotion and Tenure documents (APT) are located at <https://oaa.osu.edu/policies-and-procedures-handbook>. You'll find them close to the bottom of that page under "Sample Documents." The templates for both documents contain stock language that you can use or adapt as appropriate. OAA recognizes that your unit may have specific needs calling for alternate language.

Both templates have been substantially revised in the last couple of years. A good place to begin your updates is with a review of these templates. Note that the outline for the POA is recommended, containing topics appropriate for most units, though it may not fit the needs of all. The outline for the APT, however, is required, except for sections not applicable to your unit. For instance, if you don't have regional campus faculty, clinical faculty, or research faculty, sections on those groups may be omitted from your APT.

Note, too, that there are separate templates for TIUs and colleges. Be sure to use those for TIUs, which differ in content from those for the colleges.

- Remember that your governance documents must be reviewed by your college office before you submit them to the Office of Academic Affairs. The college office may request revisions that you should address prior to the OAA review.

Please resolve any internal uncertainties (committee composition, titles of new officers, number of required peer reviews of teaching, etc.) before submission to your college office or to OAA.

Once your college approves your governance documents, you or someone in your college office will email Word versions (please no PDFs) to Senior Vice Provost Louchouart at louchouarn.1@osu.edu. Edits, questions, and suggestions will be placed directly in the documents using the track changes feature. They'll then be returned to you with these edits.

Please accept the changes that seem appropriate. If a requested change doesn't make sense to you, however, please explain that in a comment beside the edit. Then return your documents—with edits accepted and including any comments or questions—to louchouarn.1@osu.edu. OAA will consider your concerns and will work with you to address these insofar as Faculty Rules permit.

Fine Details

- Both your POA and APT should include a cover page. Feel free to copy the generic ones that appear on the sample documents. Feel equally free to substitute ones that you like better.
- Both documents should be paginated and include a table of contents that takes account of all modifications you may make.
- Be sure that your mission statement is exactly the same in both your POA and APT. This is the only instance of duplicated material in the two documents. The iterations must be identical.
- Please provide a current link to every Faculty Rule, university policy and entity, and, if possible, college and unit documents cited. Be sure that the links you provide are current and viable. For

your easy reference, the last two pages of the sample POA and APT contain the current links typically cited in governance documents.

To comply with accessibility guidelines, all links should be embedded, not written out. For example, in citing the OAA Policies and Procedures Handbook, please feature it as the [OAA Policies and Procedures Handbook](https://oaa.osu.edu/policies-and-procedures-handbook), not the OAA Policies and Procedures Handbook, <https://oaa.osu.edu/policies-and-procedures-handbook>.

In citing Faculty Rules, please to link to the specific rule, not the general Faculty Rules link. It's unwise to quote extensively from the Faculty Rules. Because the Rules are modified from time to time, the language you've cited could easily become outdated.

Remember that the term "policy" refers to university-level documents. In your governance documents please use the term "guidelines" for references to unit-level practices.

- In describing your committees, please be sure to include the number of members, how they are appointed, the length of their term, how the chair is selected, and whether student members may vote.
- Although OAA will consider some limited alternatives to avoid confusing terminology, please use the titles that appear in Faculty Rule [3335-5-19](#) (tenure-track and associated faculty), [3335-7-02](#) (clinical/teaching/practice faculty), and [3335-7-31](#) (research faculty).
- Note that some terminology is no longer in use. Common examples include "full professor" (now, "professor"), "clinical track" and "research track" (now "clinical faculty" and "research faculty"), "Special Research Assignment" (now "Special Assignment").
- Be sure that your terminology is consistent within and across your documents. Is it the Promotion and Tenure Committee or the Appointments, Promotion and Tenure Committee? Is it the Vice Chair of Faculty Affairs or the Vice Chair for Faculty Affairs?
- Please be sure that your POA and APT document don't contradict each other. For example, does the POA indicate that your Promotion and Tenure Committee is made up of three professors and two associate professors who choose their own committee chair, while your APT says the committee consists of a different constellation of faculty, with the chair appointed by the TIU head?

If you can do so, please submit both of your documents to OAA at the same time. That makes it easier for OAA to spot any contradictions. If the POA, for instance, is submitted first and approved, then the APT is submitted later and there is a contradiction that requires an edit in the POA, the newly approved POA will have to be revised, resubmitted, and re-approved.

- Spell out acronyms on first reference. New faculty are routinely provided access to your governance documents, and they (and external readers) may not be familiar with some references.
- Avoid citing individuals' names in your documents. People change positions, so it's safer to refer to the Associate Dean for Research than to the name of the person currently in that slot.

Final Word

The best units have the best governance documents. Know that OAA will gladly respond to questions, provide suggestions, or otherwise be of help as you are updating your documents. For assistance, don't hesitate to contact Patrick Louchouart at louchouarn.1@osu.edu.