

## **Belk College Policy on Qualified Faculty Status**

The Belk College of Business is committed to maintaining a high quality faculty that is consistent with its mission of being North Carolina's Urban Research Business School. Accomplishing that mission requires that all faculty members employed by the College have appropriate initial academic or professional preparation and that they sustain their currency and relevance through appropriate scholarly or professional activities. The specific preparation and sustaining activities expected of a faculty member is a function of the type of position the faculty member holds and the courses they teach.

The purpose of this document is to define the five categories of Qualified Faculty Status (QFS) the College will utilize, the mix of faculty qualifications the College will maintain, and the *minimum* standards required for faculty members to maintain the various types of QFS. Please note that meeting the *minimum* QFS standards outlined in this document does not necessarily mean that a faculty member is meeting the College's expectations for research productivity as those expectations vary across faculty appointment types and course load.

### **I. Qualified Faculty Status**

Standard 15 of the AACSB *Standards for Business Accreditation* defines five broad classifications of QFS. These classifications are:

1. Scholarly Academics (SA) hold a research doctorate and sustain currency and relevance through scholarship and related activities.
2. Practice Academics (PA) sustain current and relevance through professional engagement, interaction and relevant activities. Normally, PA status applies to faculty members who augment their initial preparation as academic scholars with development and engagement activities that involve substantive linkages to practice, consulting, other forms of professional engagement, etc., based on the faculty member's earlier work as an SA faculty member.
3. Scholarly Practitioners (SP) sustain currency and relevance through continued professional experience, engagement, or interaction and scholarship related to their professional background and experience. Normally, SP status applies to practitioner faculty members who augment their experience with development and engagement activities involving substantive scholarly activities in their field of teaching.
4. Instructional Practitioners (IP) sustain currency and relevance through continued professional experience and engagement related to their professional backgrounds and experience. Normally IP status is granted to newly hired faculty members who join the faculty with significant and substantive professional experience.
5. Other – Individuals holding a faculty title but whose qualifications do not meet the criteria established by the school for SA, PA, SP, or IP status.

The AACSB definitions above are intentionally broad. AACSB requires that each member institution develop specific definitions for both initial preparation and continuing academic or professional engagement for each category.

The following sections provide the Belk College definitions for each QFS category. These standards are the *minimum* standards a faculty member must meet to be qualified to teach. They are not intended to be, nor should they be interpreted as, the College's expectation with respect to faculty research productivity.

## II. Scholarly Academics

The Scholarly Academic (SA) classification is the normal classification for tenured and tenure track faculty members. Faculty members that hold the ranks of Clinical Assistant Professor and Clinical Professor may also qualify under this status.

### 1. Initial Preparation

- a. Normally a research doctorate, usually a Ph.D., is the appropriate initial preparation for SA status.
- b. For faculty members teaching business law, a graduate law degree is appropriate initial preparation for SA status.
- c. For faculty members teaching tax, a graduate tax degree or an appropriate combination of graduate degrees in law and accounting is appropriate initial preparation for SA status.

### 2. Recency Requirements

- a. Faculty members that completed their Initial Preparation defined above within the previous five years (as measured on the first date of the academic year, normally July 1), will be classified as being SA for both graduate and undergraduate teaching.
- b. Doctoral candidates that have passed their comprehensive exams within the past three years (as measured on the first date of the academic year, normally July 1), will be classified as being SA.

### 3. Standard for Sustained SA status:

Faculty members that do not satisfy the Recency Requirements listed in section II.2 above must demonstrate and document ongoing Academic Engagement Activities to maintain SA status.

- a. The SA standard is two peer-reviewed journal articles (or the equivalent Academic Engagement Activities listed in subsection 4 below) in the most recent five year window **plus either**
  - i. one item from the following list:
    1. One additional peer-reviewed journal (or other equivalent Academic Engagement Activity listed in subsection 4 below);
    2. Serving as the editor or section-editor of a peer-reviewed journal;
    3. Serving as the President, Vice-President or other elected officer of a nationally or internationally recognized academic association;
    4. Serving on the board of directors of a nationally or internationally recognized academic organization;
    5. Serving as the PI or Co-PI for a federally or state funded grant;
    6. Winning an external research award from a nationally or internationally recognized academic organization;
    7. Serving as the Program Chair of a regional, national, or international academic conference;

8. Writing a college textbook or scholarly book which is published by one of the national publishing houses or a University press;
  9. Testifying to Congress or the State Legislature, or providing substantial invited advice to the Federal or State government or their agencies; **or**;
- ii. two activities from the following list:
1. Serving on the editorial board of a peer-reviewed journal;
  2. Organizing an academic session at a national or international conference;
  3. Giving an invited talk or a peer-reviewed presentation at a national or international conference;
  4. Giving an invited research seminar at another College or University;
  5. Chairing a successfully completed doctoral dissertation;
  6. Developing supplemental teaching materials for a textbook (other than one written by the faculty members) or writing a book chapter which is published by one of the national publishing houses or a University press;
  7. Serving as the editor for a scholarly book or special issue peer-reviewed journal;
  8. Publishing a case in a case journal or through one of the national publishing houses.

Note that the burden is on the faculty member to provide sufficient documentation of their activities to demonstrate that the activities were of sufficient breadth and relevance to maintain the SA status of the faculty member. Activities from these lists do not contemplate the full range or scope and scale of faculty activities. A faculty member that wishes to have a non-listed activity included or who feels that an activity has been incorrectly classified may, in consultation with their Chair, ask the Dean or Senior Associate Dean to add or reclassify that activity. In general, faculty should make such a request prior to engaging in the activity.

#### 4. Other Academic Engagement Activities

In the business disciplines peer-reviewed journals are the most common outlet for faculty research, but they are not the only appropriate outlet for faculty research productivity. For the purposes of the SA standard, the following are considered equivalent to a peer-reviewed journal article:

- i. A Federally or State-funded grant on which the faculty member is the Principal Investigator (PI) or Co-PI.
- ii. Other peer-reviewed methods of disseminating original research which are of the same level of rigor and prestige as a peer-reviewed journal. Prior to utilizing such an outlet, the faculty member shall consult with the Department Chair and/or Senior Associate Dean. They will issue a determination in writing as to whether the outlet is an equivalent Academic Engagement Activity.

### III. Practice Academics

The Practice Academic (PA) classification is normally, but not exclusively, used by faculty members holding Clinical Assistant or Clinical Professor appointments. In certain cases, tenured faculty members may also be classified as Practice Academics.

1. Initial Preparation
  - a. Normally a Ph.D. is the appropriate initial preparation for PA status.
  - b. For faculty members teaching business law, a graduate law degree is appropriate initial preparation for PA status.
  - c. For faculty members teaching tax, a graduate tax degree or an appropriate combination of graduate degrees in law and accounting is appropriate initial preparation for PA status.
  
2. Standard for Sustained PA status:
  - a. To maintain PA status a faculty member must engage in and document at least three of the following activities over a five year window.
    - i. Activities that may be counted more than once:
      1. Articles in academic or practice-oriented journals;
      2. Consulting activity that is material in terms of time and substance (note that any single project may only count once although a faculty member may get credit multiple times for engaging in multiple projects);
      3. Faculty internships;
      4. Development and presentation of executive education programs;
      5. Privately funded research projects which are administered through UNC Charlotte and on which the faculty member is a PI or Co-PI;
      6. Publishing a case in a case journal or through one of the national publishing houses;
      7. Giving an invited talk or a peer-reviewed presentation at a national or international conference;
      8. Participation in other activities that place faculty in direct contact with business or other organizational leaders. These activities must be material in terms of time and substance. Before engaging in such activities the faculty member should consult with the Chair or Senior Associate Dean to confirm that the activity is of sufficient depth and relevance to maintain PA status;
      9. Other activities which are deemed by the Dean and Department Chair to result in outcomes which support the mission of the College.
    - ii. These activities may count only once per five year period:
      1. Sustained professional work supporting qualified status;
      2. Significant participation in business professional associations;
      3. Relevant, active service on boards of directors;
      4. Maintenance of appropriate professional licensure;
      5. Participation in professional events that focus on the practice of business, management and related issues.

Note that the burden is on the faculty member to provide sufficient documentation of their activities to demonstrate that the activities were of sufficient breadth and relevance to maintain the PA status of the faculty member. Activities from these lists do not contemplate the full range or scope and scale of faculty activities. A faculty member that wishes to have a non-listed activity included or who feels that an activity has been incorrectly classified may, in consultation with their Chair, ask the Dean or Senior Associate Dean to add or reclassify that activity. In general, faculty should make such a request prior to engaging in the activity.

3. Post-Administrative PA status
  - a. Individuals that return to faculty status after having served as the Dean of the Belk College or as an Associate Dean of the College and who do not otherwise qualify as SA shall be deemed to be PA by virtue of the professional work they did during their time as Dean or Associate Dean. They shall retain PA status after returning to the faculty for a period of time equal to the lesser of five years or the duration of time they served as Dean or Associate Dean.

#### **IV. Instructional Practitioners**

The Instructional Practitioner (IP) classification is normally used for full-time faculty members holding the rank of Lecturer. It is also normally used for part-time faculty members holding the rank of Adjunct or Instructor.

1. Initial Preparation
  - a. Normally at the time of hiring an IP faculty member must have professional experience which is current, substantial in terms of duration and level of responsibility, and clearly linked to the field in which the faculty member is expected to teach.
  - b. IP faculty members will hold a master's or higher degree in the appropriate discipline.
2. Part-time faculty members that are classified as IP maintain their status through continuing professional experience provided that it remains current, substantial in terms of duration and level of responsibility and clearly linked to the field in which the person is expected to teach.
3. If a full-time faculty member is classified as IP, their duties to the University normally will preclude their maintaining currency and relevance through the professional activities through which they were originally qualified. In such a case to maintain IP status a faculty member must engage in and document at least three of the following activities over a five year window.
  - i. Activities that may be counted more than once:
    1. Articles in academic or practice-oriented journals;
    2. Consulting activity that is material in terms of time and substance (note that any single project may only count once although a faculty member may get credit multiple times for engaging in multiple projects);
    3. Faculty internships;
    4. Development and presentation of executive education programs;

5. Privately funded research projects which are administered through UNC Charlotte and on which the faculty member is a PI or Co-PI;
  6. Publishing a case in a case journal or through one of the national publishing houses;
  7. Giving an invited talk or a peer-reviewed presentation at a national or international conference;
  8. Participation in other activities that place faculty in direct contact with business or other organizational leaders. These activities must be material in terms of time and substance. Before engaging in such activities the faculty member should consult with the Chair or Senior Associate Dean to confirm that the activity is of sufficient depth and relevance to maintain PA status;
  9. Other activities which are deemed by the Dean and Department Chair to result in outcomes which support the mission of the College.
- ii. These activities may count only once per five year period:
1. Sustained professional work supporting qualified status;
  2. Significant participation in business professional associations;
  3. Relevant, active service on boards of directors;
  4. Maintenance of appropriate professional licensure;
  5. Participation in professional events that focus on the practice of business, management and related issues.

Note that the burden is on the faculty member to provide sufficient documentation of their activities to demonstrate that the activities were of sufficient breadth and relevance to maintain the PA status of the faculty member. Activities from these lists do not contemplate the full range or scope and scale of faculty activities. A faculty member that wishes to have a non-listed activity included or who feels that an activity has been incorrectly classified may, in consultation with their Chair, ask the Dean or Senior Associate Dean to add or reclassify that activity. In general, faculty should make such a request prior to engaging in the activity.

## **V. Scholarly Practitioners**

The Scholarly Practitioner (SP) classification is normally used for full-time faculty members holding the rank of Lecturer.

1. Initial Preparation
  - a. Normally at the time of hiring a SP faculty member must have professional experience which is current, substantial in terms of duration and level of responsibility, and clearly linked to the field in which the faculty member is expected to teach.
  - b. SP faculty members will hold a master's or higher degree in the appropriate discipline.
2. The SP standard is two peer-reviewed journal articles (or the equivalent Academic Engagement Activities listed in subsection 3 below) in the most recent five year window.

3. Faculty members that are classified as SP maintain their status through ongoing academic and professional engagement activities. The SP standard is one peer-reviewed journal article or peer-reviewed book chapter in the most recent five year window, *plus either*
  - i. one item from the following list:
    1. One additional peer-reviewed journal (or other equivalent Academic Engagement Activity listed in subsection 4 below);
    2. Serving as the editor or section-editor of a peer-reviewed journal;
    3. Serving as the President, Vice-President or other elected officer of a nationally or internationally recognized academic association;
    4. Serving on the board of directors of a nationally or internationally recognized academic organization;
    5. Serving as the PI or Co-PI for a federally or state funded grant;
    6. Winning an external research award from a nationally or internationally recognized academic organization;
    7. Serving as the Program Chair of a regional, national, or international academic conference;
    8. Writing a college textbook, scholarly book, or book chapter which is published by one of the national publishing houses or a University press;
    9. Testifying to Congress or the State Legislature, or providing substantial invited advice to the Federal or State government or their agencies; **or**;
  - ii. two activities form the following list:
    1. Serving on the editorial board of a peer-reviewed journal;
    2. Organizing an academic session at a national or international conference;
    3. Giving an invited talk or a peer-reviewed presentation at a national or international conference;
    4. Giving an invited research seminar at another College or University;
    5. Chairing a successfully completed doctoral dissertation;
    6. Developing supplemental teaching materials for a textbook (other than one written by the faculty members) which are published by one of the national publishing houses or a University press;
    7. Publishing a case in a case journal or through one of the national publishing houses;
    8. Serving as the editor for a scholarly book or peer-reviewed journal.

Note that the burden is on the faculty member to provide sufficient documentation of their activities to demonstrate that the activities were of sufficient breadth and relevance to maintain the SP status of the faculty member. Activities from these lists do not contemplate the full range or scope and scale of faculty activities. A faculty member that wishes to have a non-listed activity included or who feels that an activity has been incorrectly classified may, in consultation with their Chair, ask the Dean or Senior Associate Dean to add or reclassify that activity. In general, faculty should make such a request prior to engaging in the activity.

## **Mix of Faculty Classification**

The AACSB standards allow for schools and programs to set differential standards for the mix of faculty classification types. Normally the Belk College will adhere to the following minimum standards for its various programs:

### **1. Undergraduate Programs**

- 50 percent or more of the faculty resources will be SA
- 90 percent or more of faculty resources will be SA+PA+SP+IP

### **2. Professionally Oriented Graduate Programs<sup>1</sup>**

- 70 percent or more of the faculty resources will be SA
- 100 percent of faculty resources will be SA+PA+SP+IP

### **3. Research Oriented Graduate Programs<sup>2</sup>**

- 80 percent or more of the faculty resources will be SA
- 100 percent of faculty resources will be SA+PA+SP+IP

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<sup>1</sup> Professionally oriented graduate programs include the Masters in Business Administration, the Masters of Accountancy, the MS in Real Estate, and the PSM in Data Science and Business Analytics

<sup>2</sup> Research oriented graduate programs include the MS in Math Finance, the MS in Economics, and the PhD in Business Administration