

MEMO

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| <i>To</i> | Academic Unit Deans; Associate Deans Council; Chairs & Directors Council |
| <i>From</i> | Office of the Provost |
| <i>Subject</i> | Faculty and Instructional Personnel Qualifications Project |
| <i>Date</i> | November 17, 2023 |

HLC Credentialing standards require that Ohio University have a current curriculum vita and transcripts (official or unofficial) for the highest degree earned on file for faculty and instructional personnel. The memo describes:

- HLC’s Assumed Practices regarding faculty qualifications for instructional roles.
- Ohio University Policy 18.001: Faculty Credentials and Tested Experience.
- The process for faculty and instructional personnel to provide evidence of qualifications ([Appendix A](#)).
- The process for academic units to confirm qualifications ([Appendix B](#))
- Example narratives for qualifications through tested experience ([Appendix C](#))
- The instructions for obtaining a free copy of Ohio University transcripts ([Appendix D](#)).

The deadline for faculty and instructional personnel to provide evidence of qualifications is **April 15, 2024**.
The deadline for confirming qualifications is **August 1, 2024**.

HLC Assumed Practice: Faculty Roles and Qualifications

HLC’s Criteria for Accreditation and Assumed Practices define the quality standards that all member institutions must satisfy to achieve and maintain HLC accreditation.

In June 2015, HLC revised Assumed Practice B.2. to ensure academic quality by requiring institutions to demonstrate that faculty members who deliver college-level content are appropriately qualified to do so, and to ensure that institutions establish clear policies and consistent procedures to achieve such quality. Specifically, the following HLC Assumed Practice went into effect on September 1, 2017.

B.2 Faculty Roles and Qualifications

- a. Qualified faculty members are identified primarily by credentials, but other factors, including but not limited to equivalent experience, may be considered by the institution in determining whether a faculty member is qualified. Instructors (excluding for this requirement teaching assistants enrolled in a graduate program and supervised by faculty) possess an academic degree relevant to what they are teaching and at least one level above the level at which they teach, except in programs for terminal degrees or when equivalent experience is established. In terminal degree programs, faculty members possess the same level of degree. When faculty members are employed based on equivalent experience, the institution defines a minimum threshold of experience and an evaluation process that is used in the appointment process. Faculty teaching general education courses, or other non-occupational courses, hold a master’s degree or higher in the discipline or subfield. If a faculty member holds a master’s degree or higher in a discipline or subfield other than that in which they are teaching, that faculty member should have completed a minimum of 18 graduate credit hours in the discipline or subfield in which they teach.
- b. Instructors teaching in graduate programs should hold the terminal degree determined by the discipline and have a record of research, scholarship, or achievement appropriate for the graduate program.
- c. Instructors teaching at the doctoral level have a record of recognized scholarship, creative endeavor, or achievement in practice commensurate with doctoral expectations.

In 2020, HLC provided [guidelines](#) for institutions and peer reviewers for determining qualified faculty through HLC’s criteria for accreditation and assumed practices.

Ohio University Policy 18.001: Faculty Credentials and Tested Experience

Effective June 1, 2020, Ohio University approved Ohio University Policy [18.001: Faculty Credentials and Tested Experience](#) that outlined minimum credentials or qualifications for all faculty and instructional personnel at Ohio University. Through Policy 18.001, all faculty and instructional personnel may be qualified to teach courses using one of two pathways: academic credentials (primary) or tested experience (alternative).

Primary Pathway: Academic Credentials

Typically, faculty instructional personnel¹ are qualified to serve as instructors of record based on academic credentials. **Table 1** provides a brief description for each level of instruction. Additional details are available through the [policy](#).

Table 1: Qualifications through Academic Credentials

| Level of Instruction | Minimum Academic Credential Qualification* |
|--|---|
| Dual Enrollment (College Credit Plus) | Master's or doctorate degree in the content area of the course – OR – any master's degree and at least 18 credit hours completed at the graduate level in the content area of the course |
| Technical Associate Degree | Bachelor's degree in the technical field, or in a closely related discipline or subfield |
| General Education or Non-Professional | Master's degree or higher in any discipline or subfield with at least 18 graduate credit hours in the teaching field or a closely related field |
| Associate or Bachelor's Degree | Master's degree or higher in the discipline or subfield relevant to what they are teaching, or in a closely related discipline or subfield ¹ |
| Master's Degree | A terminal degree in the discipline or subfield and have a record of research, scholarship, clinical, creative activity or relevant (RSCA) achievement appropriate for the graduate program |
| Doctoral Degree | A terminal degree in the discipline or subfield and have a record of research, scholarship, clinical, or creative activity (RSCA), and preparation to teach at the doctoral level |

**Table Note:* Teaching fields, closely related fields, record of RSCA, and preparation are determined by the academic department/unit in which the course originates.

Alternative Pathway: Equivalent or Tested Experience

Alternatively, faculty and instructional personnel¹ may be qualified to serve as instructors of record based on equivalent or tested experience. *Table 2* provides a brief description for each level of instruction through equivalent experience. *Table 3* provides a brief description for each level of instruction through tested experience. Additional details are available through the [policy](#).

¹ Supervised graduate teaching assistants may be minimally qualified if they are enrolled in a graduate program of study, assist the instructor of record, utilize a faculty-approved syllabus and subject to regular supervision and assessment by a minimally qualified faculty member. Unsupervised graduate teaching assistant must be otherwise minimally qualified to teach at the undergraduate level as described.

Table 2: *Qualifications through Equivalent Experience*

| Level of Instruction | Minimum Equivalent Experience |
|--|--|
| University First Year Experience or Student Transition Courses | Bachelor's degree and five years of experience in higher education |
| Reserve Officer Training Corps Program Courses | Qualified by the Department of Defense |
| Physical Activity and Wellness (PAW) Courses | Bachelor's degree in a closely related field, an appropriate certification or license, a documented high-level of achievement in the activity, or a high-level of understanding of the pedagogy pertaining to the activity |
| Other skills/technical courses | Appropriate certification or license from a recognized body or industry credentialing agency (e.g., aviation flight/ground courses) and be approved by the Executive Vice President and Provost |

Table 3: *Qualifications through Tested Experience*

| Level of Instruction | Minimum Tested Experience* |
|--------------------------------|---|
| Associate or Bachelor's Degree | A minimum of five years of tested experience |
| Graduate Degree Level Courses | A minimum of fifteen years of tested experience –OR– a bachelor's degree in any discipline and a minimum of ten years of experience –OR– a master's degrees in any discipline and a minimum of seven years of experience –OR– possess a doctoral degree in any discipline and a minimum of five years of experience. <ul style="list-style-type: none"> ○ <i>Note:</i> Colleges may identify relevant discipline specific certifications and/or licensure that they have determined may satisfy up to half of the required work experience at each degree level. |

**Table Note:* Tested Experience refers to unique experience and expertise that qualifies the individual for the disciplinary area of the specific course or courses they will teach. Tested Experience may include discipline specific certifications, licensure, and/or other non-degree credentials AND a breadth and depth of experience outside of the classroom in real-world situations relevant to the discipline or subfield for the specific course or courses they will teach. Years of teaching in a field or discipline does not count toward tested experience.

Evidence of Qualifications

Consistent with [University Policy 18.001](#), full-time faculty, part-time faculty, and instructional personnel are responsible for providing the University with all of the documentation needed to verify credentials, including (but not limited to) a curriculum vita and transcripts (official or unofficial²) from the highest degree earned. If needed, this may also include appropriate licenses or certifications and/or verification of work related to teaching experience. The cost to obtain documents required is the responsibility of the faculty member.

Consistent with [University Policy 18.001](#), faculty and instructional personnel submitting transcripts from foreign universities or schools must have the coursework evaluated for equivalency to United States-accredited coursework by a university-approved agency. The individual is responsible for the cost of the evaluation. Examples of companies that perform evaluations include World Education Services (www.wes.org) or Educational Credential Evaluators, Inc. (www.ece.org).

Consistent with [University Policy 18.001](#), faculty and instructional personnel qualified to teach through Equivalent or Tested Experience will need to provide a brief narrative matching course and/or program outcomes with specific faculty competencies and qualifications. Examples of narratives are provided in [Appendix C](#). Indicators of competencies and appropriate qualifications may include (but are not limited to):

- i. degrees earned in a closely related teaching discipline,

² University Policy 18.001 mandates an official transcript. However, unofficial transcripts will also be accepted.

- ii. credit hours earned in the teaching discipline or related discipline,
- iii. professional licensure and certifications applicable to the teaching discipline,
- iv. national recognition/commendations in the teaching discipline,
- v. documented successful work-related experience in the field, including length of service, complexity of work, and closeness of work performed to the course's student learning outcomes,
- vi. scholarly publications in the teaching discipline (other than “vanity” press publications as determined by the department/college); and/or
- vii. other extraordinary excellence or competence in the discipline along with demonstrated success in teaching.

Important Note: University Policy 18.001 refers to two forms: *Faculty Qualification Form* and *Justification for Alternative Teaching Credentials* form. Ohio University will not be using or collecting forms to document Equivalent or Tested experience to minimally qualify faculty. Instead, departments will be asked to submit information in the “Course Qualification Tracking” section of Watermark’s [Faculty Success](#). The specific process and requested document are explained in the following section.

Processes for Documenting Qualifications

The process for documenting faculty qualifications includes two sequential processes:

1. Individual faculty (or proxies) are responsible for providing Activity information in Faculty Success. Individual faculty are responsible for providing appropriate information and evidence (including official or unofficial transcripts) no later than **March 15, 2024**. Please refer to [Appendix A](#) for instructions.
2. Academic units (e.g., department chairs/school directors, associate deans, or proxies) are responsible for completing the Teaching Qualifications section of Faculty Success. Academic units are responsible for verifying academic credentials no later than **August 1, 2024**. Please refer to [Appendix B](#) for instructions.

Appendix A: Faculty and Instructional Personnel Instructions

Step 1: Login

To access Watermark Faculty Success (DM) please go to:

<https://www.digitalmeasures.com/login/ohio/faculty/dashboard/showDashboard>

Log in using your Ohio University username (the part of your e-mail address that comes before @ohio.edu) and password.

TIP: Generally, if a particular field does not apply, just leave it blank.

TIP: At the bottom of most data input screens, there are at least two buttons, including a Save button and a Cancel button. After making changes to your information anywhere in the system, be sure to press Save. Otherwise, your edits will be lost.

Step 2: Personal and Contact Information

- Click the “Activities” link and go to *General Information > Personal and Contact Information*.
- Provide required personal information including:
 - First Name – this should be your first name as it appears in UHR records.
 - Last Name – this should be your last name as it appears in UHR records.
 - Email Address – this should be your official Ohio University email address.
- Provide other personal and content information, if desired. (*Note:* All other information is optional.)

Step 3: Academic, Government, Military, and Professional Positions

- Click the “Activities” link and go to *General Information > Academic, Government, Military, and Professional Positions*.
- Click the “Add New” button to add your current faculty position.
- Provide required position information including:
 - Experience Type (This should be “Academic – Post-Secondary.”)
 - Organization (This should be “Ohio University.”)
 - Title/Rank/Position
 - Start Date
- Click “Save” to save your work.
- Repeat the process for other positions, if desired.
 - Important Note: If you are qualified to teach one or more course(s) using work-related experience in the field (i.e., alternative pathway), please add your work experience in this section including experience type, organization, title, and brief description.

Step 4: Administrative Data – Yearly Data

- Click the “Activities” link and go to *General Information > Administrative Data – Yearly Data*
- Click 2023-24 or “Add New” if 2023-24 is not listed.
- Provide required information including:
 - Tenure Status
 - Faculty/Staff Rank
 - Staff Classification
 - Academic / Fiscal Year Appointment
- Provide other educational information, if desired. (*Note:* All other information in this section is optional.)
- Using the “Current Vita” upload box, upload an electronic copy of your current vita (updated as of August 15, 2023).
- Click “Save” to save your work.
- Repeat the process for other years, if desired.

Step 5: Education

- Click the “Activities” link and go to *General Information > Education*.
- Click the “Add New” button to add the academic credential that qualifies you to teach. For most faculty, this will be the highest degree earned.
- Provide required education information including:
 - Degree (e.g., PhD, MS, ED, etc.)
 - Institution
 - Location of Institution (City, State, Country)
 - Emphasis/Major
 - Highest Degree You Have Earned (Yes or No)
 - Date Completed
- Using the “Transcript” upload box, upload an electronic copy of your transcript for the academic credential that qualifies you to teach.

Important Note(s):

 - If your qualifying academic credential was earned from an institution other than Ohio University, you will need to request your official or unofficial transcript from the degree-granting institution.
 - If your qualifying academic credential was earned from Ohio University, you have two options: standard request (with a fee) or alternative request (with a fee waiver). (Please refer to [Appendix D](#) for instructions).
- Provide other educational information, if desired. (*Note:* All other information in this section is optional.)
- (*Optional*) Repeat the process for other degrees earned.

(Optional) Step 6: Licensures and Certifications

- Click the “Activities” link and go to *General Information > Licensures and Certifications*.
- Click the “Add New” button to add your current faculty position.
- Provide Licensures and Certifications information including:
 - Title of Licensure/Certification.
 - Sponsoring Organization.
 - Number (if applicable).
 - Scope.
 - State(s) in which registered.
 - (*Optional*) Provide description.
 - Date Obtained.
 - Expiration Date, if applicable.
- (*Optional*) Repeat the process for other positions.

Step 7: Scheduled Teaching

- Click the “Activities” link and go to *Teaching > Scheduled Teaching*
- Check to verify that courses in which you were listed as the Instructor of Record from 2017-23 are listed.
- If any courses are not listed, please notify Katie Hartman (hartmank@ohio.edu) or Adam Pergram (pergram@ohio.edu).

Appendix B: Academic Unit Instructions

Academic units (e.g., department chairs/school directors, associate deans, or proxies) are responsible for completing the *Course Qualification Tracking* section of Faculty Success for faculty and instructional personnel (excluding graduate student instructors) affiliated with their department or school.

Important Notes

- The process involves using the Manage Data function in Faculty Success to verify credentials for instructors of record for each course.
- OIT has uploaded Ohio University courses between 2017-2023 by instructor of record. Individual faculty should see the list of courses taught by term in *Teaching > Scheduled Teaching*.
- Credentials should be verified for instructors of record (excluding graduate student instructors) for courses – listed by course prefix and number (not term) – taught between 2017-2023. If an instructor indicates that a course is missing from the list of courses in *Scheduling Teaching*, please inform Katie Hartman (hartmank@ohio.edu).
- The process should be completed after the instructor has entered their information (see [Appendix A](#)).

Step 1: Login

To access Watermark Faculty Success (DM) please go to:

<https://www.digitalmeasures.com/login/ohio/faculty/dashboard/showDashboard>

Log in using your Ohio University username (the part of your e-mail address that comes before @ohio.edu) and password.

Step 2: Manage Data

- Using the Manage Data tab, select the name of the person from the list or type the person’s name (last, first) for which you are verifying their credentials using the “User” field.
 - *Note:* If the name of the faculty member in your department or school is not listed or if there is a name listed that is not affiliated with your department or school, please contact Katie Hartman (hartmank@ohio.edu) or Adam Pergram (pergram@ohio.edu) to correct the information.
- After you have selected the correct person, click Continue. This should take you back to the Activities tab for the person you have selected.

Important Note: Chairs and Directors (or proxies) are expected to qualify faculty and instructional personnel whose primary academic unit affiliation is with the chair’s department or school. This may involve qualifying individuals for courses affiliated with another department.

- When the department chair or school director has the authority to qualify the person to teach one or more course(s) outside his or her department/school, please complete Step 3 for those courses.
- When the department chair or school director lacks the authority to qualify the person to teach one or more course(s) outside his or her department/school, please ask the appropriate department chair or school director to verify qualifications.

Step 3: Check Activity Information

- After you have effectively turned on the Manage Data function for an individual user (see Step 2), you can review the submitted *Activity* information for that individual including:
 - Personal and Contact Information
 - Academic, Government, Military, and Professional Positions
 - Administrative Data – Yearly Data (including an uploaded copy of their curriculum vita)
 - Education (including their transcript)
 - Licensures and Certifications (if completed)
 - Scheduled Teaching (2017-23)

Step 4: Verify Qualifications

- Click the “Course Qualification Tracking” link in Teaching section of the Activities tab.
- You should see a list of the courses the person has taught. Click one of the courses.
- After you selected one course from the list, another screen should appear that includes the Course Prefix and Course Number you selected.
 - Select one or more of the bases for qualification for the course you selected.
 - Degree in Discipline
 - 18 Graduate Credit Hours in Discipline
 - Degree in Related Discipline
 - Other Qualification (*only necessary for Equivalent or Tested Experience pathway*)
 - Using the drop-down menus, select the appropriate credential (or combination of credentials) for the course.
 - Degree in Discipline, 18 Graduate Credit Hours in Discipline, or Degree in Related Discipline
 - If the faculty member is qualified to teach based on academic qualifications (i.e., degree in discipline, graduate credit hours, or degree in related discipline), select the appropriate degree (typically the highest degree) from the list using the Degree drop-down menu.
 - Other Qualification Narrative
 - *Example:* If the faculty member is qualified to teach based on a combination of “Degree in Discipline” and “Work History” (per the Tested Experience pathway), then select the highest degree from the list using the Degree drop-down menu and the relevant work experiences from the Work Experience drop-down menu.
 - *Example:* If the faculty member is qualified to teach based on a combination of “Degree in Discipline” and “License or Certification” (per the Tested Experience pathway), then select the highest degree from the list using the Degree drop-down menu and the relevant work experiences from the Work Experience drop-down menu.
 - Supporting Documentation / Narrative (*only necessary for Equivalent or Tested Experience pathway*)
 - If selecting equivalent or tested experience, please provide a brief narrative to explain equivalent or tested experience (see [Appendix C](#) for examples)
 - Click Save
- Repeat the process for each of the courses listed.

Important Note: It is possible that some faculty may be qualified to teach select courses based on academic qualifications (i.e., degree in discipline, graduate credit hours, or degree in related discipline) while also qualified for other courses based on equivalent or tested experience (i.e., other qualification narrative).

- For courses in which they are academically qualified, no narrative is required.
- For courses in which they are qualified through equivalent or tested experience, please provide a brief narrative (see [Appendix C](#) for examples).

Step 5: Close and Repeat

- After you have completed the qualification process, close the “Manage Data for” function using the “X” in the upper right-hand corner.
- Repeat Step 2-4 until you have qualified all faculty and instructional personnel on your list.

Appendix C: Narrative Examples for Tested Experience

If a faculty member is not qualified through academic credentials, they must be qualified through Equivalent or Tested Experience. Consistent with [University Policy 18.001](#), faculty qualifications to teach through Equivalent or Tested Experience will need to provide a brief narrative matching course and/or program outcomes with specific faculty competencies and qualifications. Indicators of competencies and appropriate qualifications may include (but is not limited to):

- degrees earned in a closed related teaching discipline,
- credit hours earned in the teaching discipline or related discipline,
- professional licensure and certifications applicable to the teaching discipline,
- national recognition/commendations in the teaching discipline,
- documented successful work-related experience in the field, including length of service, complexity of work, and closeness of work performed to the course's student learning outcomes,
- scholarly publications in the teaching discipline (other than “vanity” press publications as determined by the department/college); and/or
- other extraordinary excellence or competence in the discipline along with demonstrated success in teaching.

Degrees in discipline, degrees earned in a closely related teaching disciplines, and graduate credit hours earned in the teaching discipline or related discipline do not require a narrative.

For other qualifications in Test Experience, the following are two example narratives.

Sample Narrative for Professional Licensure Applicable to the Teaching Discipline for all undergraduate courses in a related field.

(Name of faculty member) is qualified to teach all College of Business Accounting undergraduate courses through their professional licensure as a Certified Public Accountant in the state of Ohio. (Name of faculty member) earned a MS in Finance in 2005 and subsequently completed 24 semester hours of undergraduate accounting coursework prior to successfully completing the Accountancy Board of Ohio CPA Examination in 2008. (Name of faculty member) has continuously maintained their CPA license since 2008. The four sections of the CPA Exam - Auditing and Attestation (AUD), Business Environment and Concepts (BEC), Financial Accounting and Reporting (FAR) and Regulation (REG) – parallel the content of undergraduate Accounting courses.

Sample Narrative for Work-Related Experience specific undergraduate courses in a related field.

(Name of faculty member) is qualified to teach select College of Business Marketing undergraduate courses through their work-related. (Name of faculty member) earned a Bachelor of Science in Journalism with a Strategic Communication Major in 2010 and subsequently worked in the advertising industry as a content creator and account executive for eight years. Based on relevant work experience, (name of faculty member) is qualified to teach MKT 3020 - Consumer Marketing, MKT 4440 - Consumer Behavior, MKT 4500 - Management of Promotion, and MKT 4300 - Digital Marketing and Sales Strategies.

Appendix D: Transcript Instructions for Ohio University Degrees

Faculty members who are academically qualified by earned degrees from an institution other than Ohio University should contact the degree-granting institution for information on how to obtain unofficial or official transcripts for the degree(s) completed.

Faculty members who are academically qualified by earned degrees from Ohio University have two options for obtaining a copy of the transcript.

Option 1: Standard process (*costs associated*)

Anyone who has earned a degree from Ohio University can utilize the [standard process](#) to request transcripts and then upload transcripts into the Watermark Faculty Success (*formerly Digital Measures*) system. Transcripts can be obtained by utilizing one of the following options:

- Order an official transcript online through [Parchment](#), the online vendor.
- Order an official transcript by mail by using the [transcript request form](#).
- Visit the Office of the University Registrar: 1st Floor, Chubb Hall, Monday-Friday 8a-5p.

Associated costs for obtaining a copy of a transcript vary by option.

Option 2: Alternative process (*free of charge*)

The Ohio University Office of the University Registrar is offering an alternative (*free*) process for obtaining transcripts. For faculty who request transcripts through the alternative process, the Office of the University Registrar will submit requests on behalf of the faculty directly to Parchment and then pay the associated transcripts costs. To obtain and report your transcript through the alternative process, please do the following:

- Step 1. Complete the [Faculty Transcript Authorization](#) form no later than **December 15, 2023** (first deadline) or **January 31, 2024** (second and last deadline).³
- Step 2. Wait 15 business days for Parchment to email you an electronic copy of your transcript. (*Note: Emails will be sent directly to you directly from Parchment.*)
- Step 3. Upload the electronic copy of your transcript into Watermark Faculty Success no later than **April 15, 2024**.

³ After January 31, 2024, faculty will be required to use the standard process for obtaining transcripts for degrees earned from Ohio University.