

# Assigning | Managing | Evaluating Joint Extension-Research Faculty Appointments

*Texas A&M AgriLife Extension Service  
and Texas A&M AgriLife Research Guiding Principles*

This document is intended to provide a thorough reference point for the proper alignment of faculty members' percentage efforts within AgriLife Extension and AgriLife Research, for both new and existing joint faculty positions. Joint appointments should be considered when deemed necessary to: address the needs of the stakeholders of the Extension and Research agencies, contribute to our Land Grant Mission, and put the faculty member in a position to succeed and successfully progress through the faculty promotion process based on their merits.

## **CONSIDERATIONS for Joint Appointments**

- Appropriate Agency administrators and others will consider and agree upon each of the following, before initiating conversations with faculty members.
  - Identified Needs
  - Expected Benefits
  - Appropriate percentage splits
- For new positions:
  - Research and Extension must both approve the position before posting.
  - When considering position requests with a joint Research and Extension appointment, as appropriate, Center leadership (Center Directors and Regional Program Leader) and Departmental leadership should be involved in considering positions to be requested.
  - Agency contributions to the position will be determined on a case-by-case basis.
  - Both agencies commit to maintain the percentage split, unless mutually agreed.
  - The agency with the majority appointment will lead in drafting the position request, managing the hiring process, and onboarding.
  - Contributions to start-up by each Agency will be made on a case-by-case basis dependent on the position description.
- For existing positions:
  - When considering joint appointments for existing faculty, the appropriate administrators from each Agency and others (i.e., Center Director, Institute Director, Associate Department Head, Department Head and Dean/Director(s)) should come to an agreement before initiating conversations with the faculty member.
  - The faculty member would need to agree to the joint appointment before proceeding.
- Annual position reviews to examine:
  - The faculty member's scope of work between both agencies.
  - Effectiveness of the split appointment over time.
  - Appropriate changes to the job description and plan of work as needed.
  - Faculty annual evaluations conducted by their immediate supervisor(s) should inform the effectiveness of the split appointment over time. A critical third-year review (mid-term) will assist in informing both agencies with regards to investments and, if needed,

lead to agree upon needed changes in appointment percentages best fitting the Agencies.

- Are stakeholder/constituent needs being met in this position?
- Does this position further the integrated mission of both agencies?
- Does this position further the mission of the Texas A&M University System?

## **SUPERVISION AND PROMOTION for Joint Appointments**

- Faculty with Majority Extension Appointment (07 ad loc):
  - If based in Departments - supervision will be by the Associate Department Head for Extension by delegation of the Department Head, with input from the Center Director with whom the faculty member's research is most closely aligned.
  - If based at a Research and Extension Center - the Extension Regional Program Leader and Center Director will be invited to provide input into the faculty member's annual evaluation, and plan of work.
  - The promotion processes will be directed by the Department Head, who will seek input from other Supervisors (as applicable, the Associate Department Head and Center Director), along with the Extension Service Peer Review Committee.
- Faculty with Majority Research Appointment (06 ad loc):
  - If based on campus in an academic department - supervision will be by the Department Head, with input from the Associate Department Head for Extension.
  - If based at a Research and Extension Center - supervision will be by the Center Director, who will invite input from the Department Head, Associate Department Head for Extension, and Extension Regional Program Leader.
  - The promotion processes will be directed by the Department Head, who will seek input from other Supervisors (as applicable, Center Director and the Associate Department Head for Extension), along with the Research Peer Review Committee.
- Promotion Requests and Midterm Reviews:
  - Will be handled by the agency with the majority appointment.
  - Will follow the process as outlined in the established Guidelines for the Promotion of Texas A&M AgriLife Research and Extension Service Faculty and Joint Appointments document.
  - When the promotion process reaches the Directors office for consideration the Ad loc agency will seek confer with other Agency Director before making a final decision on promotion.

## **EXPECTATIONS IN RESEARCH of the Faculty Member's Efforts**

- Annually determining the proportion of time and scope spent in Research and Extension activities.
- Annually reviewing or updating the job description and plan of work to match.
- Clear communication of expectations to uphold the Research appointment percentage proportion between the faculty member and:
  - The Department Head

- The Center Director
- The Associate Department Head for Extension (when applicable)

### **EXPECTATIONS IN EXTENSION of the Faculty Member's Efforts**

- Support of the Extension network by working with County Extension Agents and other Extension Personnel, including:
  - Scheduling, planning, developing, implementing, and evaluating programs.
  - Conducting Extension personnel training.
  - Individual consultation.
  - Site visits with clientele as appropriate.
  - Speaking roles or education roles at educational events.
  - Assisting in result demonstrations.
  - Developing resources and tools for use by both Extension Agents and stakeholders.
  - Reporting activities as appropriate using available Agency reporting tools.
- Clear communication of expectations to uphold the Extension appointment percentage proportion between the faculty member and:
  - The Department Head
  - The Center Director
  - The Associate Department Head for Extension
  - The Regional Program Leader (when applicable)

### **Research expectations for faculty with majority Research appointments**

- Maintain an active, nationally recognized, research program.
- Demonstrate excellence in research productivity and extension programming.
- Serve as PI's or Co-PI's on research projects.
- Serve as chairs or co-chairs on graduate student committees.
- Serve as senior author and/or have graduate students listed as first author on peer-reviewed publications.
- Succeed in obtaining commodity, state, and national competitive grants.
- Establish a positive trajectory in developing a regional, national, and international reputation for their research in the appropriate field or discipline.
- Should have an active Extension program to support the mission of the AgriLife Extension, agreed upon by Center and departmental leadership (as applicable), following Extension reporting requirements as outlined by departmental leadership.

### **Research expectations for faculty with majority Extension appointments**

- Serve as collaborators on research projects and grants.
  - NOTE: Extension-oriented grants have equal weight as research grants.
- Succeed in obtaining commodity, state, national, and industry competitive grants
- Co-author articles in peer-reviewed research publications.
- Serve on graduate student committees.
- Present findings at state and national meetings.

### **Faculty with 25% or greater Research appointment**

- Faculty with 25% or greater research appointment are expected to maintain an active Hatch project and submit an annual progress/final report in the NIFA Reporting System, and/or actively participate in a Hatch Multistate project as an Official Station Representative in the National Information Management & Support System (NIMSS). Faculty with less than 25% research appointment are not required to maintain a Hatch project, but, if not, they are expected to participate in a Hatch-Multistate project.
- Except in certain cases, the grant submission will be through the principal investigator faculty member's ad loc. For exceptions, SRS will coordinate with agency administration if needed.
- Faculty on joint Extension-Research appointments are expected to charge the full Facilities and Administrative (F&A) rate on their grants and contracts, as allowed by the sponsor.

## **EVALUATION CRITERIA**

- Joint faculty will be evaluated for promotion based on:
  - The career ladder criteria established by each agency.
  - The context of their position description and relative agency appointments.
- Within the first year of appointment:
  - A mentoring faculty committee will be established.
  - Preferably composed with a minimum of one faculty member with mostly research appointment, and another with mostly Extension appointment.