

ACADEMIC PROMOTION APPLICATION INSTRUCTIONS AND INFORMATION

Comprehensive instructions to
support the application and
assessment of Academic
Promotion at Monash
University.

2026 ROUND

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STATEMENT

These instructions contain detailed information on the application requirements for submitting an application for academic promotion to Levels B, C, D and Professorial.

In addition to these instructions, applicants must comply with the [Academic Promotion Procedure](#). Failure to comply with the Academic Promotion Procedure and these Application Instructions may result in the removal/withdrawal of an academic promotion application.

References to the Executive Leader are determined by a faculty, location or Centre/Institute reporting line as either the Faculty Dean, Sub-Faculty Dean, Pro Vice-Chancellor, Deputy Vice-Chancellor or Director of Centre/Institute as relevant to the applicant. Likewise, references to the Dean include Deans, Sub-Faculty Deans, and Directors of Centres/Institutes (MUARC and MSDI) unless otherwise specified.

Positions equivalent to Professor and Senior Principal Research Fellow are jointly referred to as 'Professor' throughout this guide.

The essential documents required to guide the completion of a promotion application include:

- [Academic Promotion Procedure \(Levels B-E\)](#)
- [Academic Promotion Application Instructions](#)
- [Academic Promotion Application Form \(Levels B-E\)](#)
- [Academic Performance Framework](#)

Further detailed information on academic promotion can be found on the [Academic Promotion website](#).

PREPARING FOR PROMOTION

Before applying for a promotion, applicants should:

- have discussed their promotion readiness with their supervisor as part of their annual performance and development process;
- check the promotion eligibility criteria as outlined in the procedure;
- attend an information session in the year they intend to apply so they are clear on the process; and
- ensure their research achievement record is up-to-date.

Applicants are encouraged to attend available information session/s and review the [video resources](#) on the promotion website to understand the current process and expectations.

While the decision to apply for promotion is up to the applicant, Monash expects the applicant to discuss their intention with their performance supervisor and head of unit and that they have their support. Professorial applicants should also discuss their plans with their Executive Leader. Research-only applicants should discuss their intention with the relevant grant holder or head of unit (as appropriate).

Non-faculty applicants must align their research performance standards with those of a faculty. Applicants should consult with their Director of Centre/Institute about the most relevant faculty to align their research and then contact their [promotion coordinator](#) to facilitate the application assessment with the relevant faculty Dean.

Applicants should notify their [promotion coordinator](#) of their intention to apply.

YOUR CASE FOR PROMOTION

The Case for Academic Promotion form allows applicants to provide evidence and demonstrate how they meet the promotion criteria consistent with their academic role, focusing on outcomes and impact. Promotion cases should emphasise the impact of academic activity at a national and international level.

1. The Application Form

- 1.1 Applicants must ensure they use the correct form for the year they are applying. The correct form will include the year of application at the top of the form (e.g. the 2026 form if submitting the application in 2025). The University may not progress applicants who submit their application on a previous year's form.
- 1.2 The [Case for Academic Promotion form](#) includes the following sections:
 - Part A – Applicant Summary
 - Applicant details
 - Executive summary of achievements to date (Levels C-E only)
 - Three-year vision
 - Qualifications and appointments
 - Relevant circumstances (achievement relative to opportunity)
 - Part B – Case for Promotion (since appointment or promotion to current level)
 - Case for promotion – nominated outputs, research, education and engagement

- Part C – Recommendations
 - Performance supervisor recommendation
 - Head of Unit recommendation
- Part D – Support Information
 - Assessor exclusion (Levels C-E only)
 - Research funding (research-only applicants)
 - Applicant declaration

2. Applicant details

- 2.1 In addition to providing all the relevant personal and position details, applicants must provide the month and year of their appointment to their current level (relevant promotion period). Their application should highlight achievements since their last promotion/appointment. If they joined Monash at the same or a higher level, they may include achievements from their previous employer(s).
- 2.2 Applicants must indicate their current workload allocation across research, education, and engagement based on their employment contract and the current year's confirmed performance development plan. All applicants must include an engagement allocation. If their workload has varied significantly since their last promotion/appointment, address this in Section 1.2 or Section 5 (Relevant Circumstances – Achievement Relative to Opportunity).
- 2.3 Education-focused applicants must specify the predominant nature of their research since their last promotion/appointment.
- 2.3.1 This will determine if the Associate Dean (Education) or Associate Dean (Research) will provide a report. The Associate Dean (Education) may prepare the research report if the research is predominantly education research related to teaching and learning (pedagogical), rather than discipline-based. The Associate Dean (Research) may prepare the research report if research is discipline-based.
- 2.4 Applicants are encouraged to include their Google Scholar Profile (set to public) and/or their ORCID iD.

3. Executive summary of achievements to date (Levels C, D and Professor only)

- 3.1 This summary will highlight the main focus of the applicant's work and the overall impact of their contributions (career and at current level) in the wider context of their discipline. It may include a summary of their research outputs (e.g., impact factor, h-index), income, HDR students, education and/or engagement, which they may also include in Part B – Case for Promotion.

4. Three-year vision

- 4.1 An applicant's vision statement will state the direction of their research, education and engagement over the next three years, providing the intended outcomes they expect to achieve during this time. It will link to their Faculty's and/or Monash's strategy (Impact 2030). Using the academic performance framework (key performance indicators for Practice Academics), this should include:
- what the applicant will achieve;
 - how the applicant plans to achieve it;
 - priorities and areas of focus;
 - how success will be measured; and
 - what would happen if the applicant achieved it.

5. Qualifications and appointments

- 5.1 In this section, applicant must detail their formal and other qualifications, including the year, qualification, and awarding institution. List any current appointments and positions within and outside Monash (e.g., board memberships). For previous roles, include the equivalent level where relevant. Only professional awards and distinctions received since the last promotion/appointment should be included.
- 5.2 Applicants are required to provide their entire career publication list, which must include all authors and publication details. This must be attached as a separate pdf document.

6. Relevant circumstances (achievement relative to opportunity)

- 6.1 Sometimes, applicants need to explain the challenges they have faced in their career that put their research, education, and engagement into context. Applicants should take the opportunity to do this as a promotion panel is unlikely to know the issues and circumstances. Applicants should describe the circumstances succinctly and clearly state the impact on their career performance.

This achievement relative to opportunity is a positive acknowledgement of what an applicant can and has achieved given the opportunities available to them and results in a more calibrated assessment of their performance. It is not about providing “special consideration” or expecting lesser standards of performance.

6.2 Relevant circumstances may include (but are not limited to):

- Personal Circumstances

A career disruption caused by personal circumstances that involves a prolonged interruption or poses a significant impact to a person’s capacity to work.

This includes, but not limited to; disruptions caused by parental leave, major illness/injury, carer responsibilities, disability, and personal trauma.

- Professional Circumstances

A track record and associated productivity are relative to the stage of career, including consideration as to whether productivity and contribution are commensurate with the opportunities available to you.

This includes but is not limited to periods of part-time work, country relocation, late or non-linear entry into academia, cultural expectations, varied workload or relocation of a research laboratory or clinical practice setting or other similar circumstances that impact upon productivity.

- Other

Provide a brief summary of the circumstances. ‘Other’ may include elements outside the control of an applicant such as, but not limited to:

- natural disasters such as flooding, bushfires, storms and earthquakes;
- global health issues such as the COVID-19 pandemic; and
- other emergency situations.

6.3 Where all parties agree, any adjustment to goals and targets should be/have been recorded in the performance development plan. Where this was agreed by the faculty/non-faculty area, include this detail in the Relevant Circumstances section.

6.4 Applicants may choose not to provide sensitive details about relevant personal circumstances on the form. Where it is important to share sensitive details for relevant personal circumstances to be accurately understood, applicants should arrange to have a private discussion with the Chair/Approver (or nominee).

Note: Refer to Appendix B – Preparing Relevant Circumstances for Promotion.

7. Case for promotion – research, education and engagement

7.1 Applicants will illustrate how they meet the criteria for promotion in the relevant areas of academic activity. For most applications, this will include evidence of achievements across the three key areas of academic activity: research, education and engagement.

- **Research-only:** applicants are only required to make a case against the research and engagement activity areas.
- **Education-focus (including Scholarly Teaching Fellow, Teaching Fellows and Senior Teaching Fellows):** applicants are not required to complete the research case unless there is disciplinary research (in which case this should be included in the research section). Applicants are expected to address education (pedagogical) research related to teaching and learning when answering E2b. If they cannot address it, they must provide an explanation.
- **Practice academic:** applicants must complete Nominated outputs and the relevant key areas of academic activity that apply to their employment conditions with the University.

7.2 Applicants should only include achievements since the appointment to their current level.

7.3 Applicants will thoroughly document a body of contributions and achievements that show sustained development over time. They are required to comment against the relevant criteria of the [academic performance framework](#) for each area of academic activity – research, education and engagement. They should include evidence that demonstrates outcomes and impact. Focus on outlining significant achievements since their last promotion/appointment to current level, avoiding unnecessary duplication of data in supplementary reports.

7.4 A maximum 8-page limit applies across the entire Part B. The 8-page limit does not include headings and explanatory text in the case for promotion form itself. **Do not include hyperlinks in the case.**

7.5 Committees and Approver/s will consider significant contributions of engagement due to being part of an under-represented group. This includes women in STEMM (Science, Technology, Engineering, Mathematics and Medicine) disciplines and Aboriginal and Torres Strait Islander applicants.

7.6 Benchmarking and comparisons against the achievements of other staff members must not be referenced in applications.

7.7 Applicants should appropriately cross-reference linkages in their application rather than repeat evidence.

Nominated Outputs

- 7.8 Applicants will nominate outputs in support of their application to assist in an assessment of research. Publishable works must be published and not under review or any other statuses. Choose sample items to showcase work. Applicants must provide their DOI website link (Digital Object Identification) AND attach a pdf file for each output. Consideration must be given to the length and size of documents, as to what is reasonable for external assessors and members of the committee to read. Seek advice from the Deputy/Associate Dean (Research) for clarity.

Note: The pdf file will be provided to the external assessors, and University staff will use the link.

- 7.9 For large outputs, such as a book, applicants may nominate up to two chapters (as one nominated output). In this circumstance, only the relevant chapter/s must be attached, not the book.
- 7.10 Non-traditional outputs may be considered, please contact the Deputy/Associate Dean (Research) for advice.
- 7.11 For Education-focused applicants, please nominate pedagogy research outputs. Seek advice from the Deputy/Associate Dean (Education) for clarity.
- 7.12 The number of outputs which can be nominated varies as follows:

Applying for Promotion to Level	Nominated Outputs
B and C	up to 2
D & Professor	up to 3

Note: 1 journal article = 1 output

Research

- 7.13 Demonstrate achievements drawing on relevant evidence (including the Research Achievement Record) that focuses on outcomes and impact. Applicants will address:
- research criterion 1 and 2 of the academic performance framework; and
 - research criteria 3-5 (where relevant).

- 7.14 Applicants can include research supervision achievements under either the research or education category, but not both.

- 7.15 Applicants applying to Levels C, D, and Professor (excluding education-focused or international campus-based applicants) may provide context for their Research Performance Report in this section.

Note: The Research Performance Report is part of the application but will not be shared with external assessors.

Education

- 7.16 Research-only applicants are not required to complete this section.

- 7.17 Applicants who have 10% or less allocated to Education should address their teaching/education activities within the Engagement section of the application form. Should the 10% in Education represent support for higher degree by research students, this can be addressed in the Research section of the application form. If applicants are involved in teaching, they will address [education criteria \(areas of impact\)](#) of the [academic performance framework](#):

- E1 - Area of Impact – Student Learning: all practice elements (a – d),
- E2 - Area of Impact – Educational Knowledge: one of two practice elements (a or b), and
- E3 – Area of Impact – Educational Environment: one of two practice elements (a or b).

- 7.18 Education-focused, Scholarly Teaching Fellow, Teaching Fellow and Senior Teaching Fellow applicants are expected to address education (pedagogical) research related to teaching and learning when answering E2b. If applicants cannot address this, please provide an explanation and select the other practice element (E2a). Further information is available at the [Monash Education Academy website](#).

Engagement

- 7.19 Demonstrate achievements against each chosen criterion drawing on relevant evidence that focuses on outcomes and impact.
- 7.20 Applicants will address the relevant engagement criteria from the [academic performance framework](#) that most applies to their case. Examples of engagement activities are available on the [academic performance framework](#) website.

8. Performance supervisor recommendation

- 8.1 The performance supervisor will comment on:
- achievements across research, education and engagement (where applicable);
 - provide an assessment of performance against the criteria for promotion;
 - if there is a prima facie case for the application to be considered or is premature; and
 - the applicant's case for promotion overall.
- 8.2 Where a dual reporting line exists, a secondary supervisor report is required. Please contact the [relevant promotion coordinator](#) for assistance.

9. Head of Unit recommendation

- 9.1 The Head of Unit receives the promotion application and will provide their assessment and recommendation relative to:
- achievements across research, education and engagement;
 - provide an assessment of the applicant's performance against the criteria for promotion;
 - if there is a prima facie case for the application to be considered or is premature; and
 - the applicant's case for promotion overall.
- 9.2 Where a case for promotion is premature, the Head of Unit will detail to the applicant how they can strengthen their academic performance.
- 9.3 Where an applicant is affiliated with multiple school/unit/department, a secondary Head of Unit report is required. Please contact the [relevant promotion coordinator](#) for assistance. Teaching and Research applicants from Monash Suzhou will require a secondary Head of Unit report from the Head of Unit in Australia. Please contact the [relevant promotion coordinator](#) for assistance.
- 9.4 For Professorial applicants, where the Dean is the performance supervisor and/or the Head of Unit, please contact the [relevant promotion coordinator](#) for assistance.
- 9.5 Applicants who are Head of Units and applying for promotion must not complete the Head of Unit section for other applicants applying to the same academic level in the same promotion round.

10. Assessor exclusion (Levels C, D and Professor only)

- 10.1 Applicants are not made aware of who the nominated assessors are, but they have the option to nominate any individual/s to be excluded as a potential assessor prior to the assessor nomination process.
- 10.2 Only complete this section of the form where there is an assessor/s the applicant wishes the Head of Unit to exclude in inviting to assess the application. The Head of Unit (or their nominee) contacts each assessor (not the applicant).

11. Research funding (research-only applicants)

- 11.1 Where the source of the funding was the research grant, the grant holder, acting on the advice of the Monash Research Office, will be able to confirm that promotion is permissible under the terms and conditions of the grant contract, including that the grant funds can be used to fund a salary at a higher level.
- 11.2 This section must be completed by either the applicant (if they are the grant holder) or the primary grant holder (if the applicant is employed under another person's grant).
- 11.3 The Head of Unit will confirm any alternative funding and detail this in Part C (in cases where funding from other sources is available).

12. Applicant declaration

- 12.1 Applicants will select either yes, no or N/A to the questions within the declaration and sign their application. Applications will not progress without this declaration fully completed.

13. Supporting reports and documents

13.1 System-generated reports must not be marked up.

Research Achievement Record

13.2 This report must list achievements for the period since the last promotion/appointment to the current level (including outputs achieved prior to being employed at Monash, if relevant) in:

- research outputs;
- research grants and income; and
- HDR supervisions.

13.3 Applicants are responsible for ensuring their research data is accurate in Pure (where Pure is relevant) prior to requesting their report. Applicants from Australia, Indonesia and Malaysia can obtain their report by referring to [Requesting system generated academic promotion reports](#).

13.4 Applicants should review their report and advise their faculty research office of any significant errors to determine if corrections are required and another report generated.

13.5 Research Achievement Record may be supplemented by:

- adding any entries not captured on the recent additions and errata page;
- completing the final two columns on the research outputs page (i.e. significant author indication and number and source of citations); and
- completing the final column on the research funding page (i.e. an estimate of contribution percentage).

13.6 The approver/promotion committee will consider additional data on the 'recent additions and errata page' in the same way as system-generated data.

13.7 Suzhou-based applicants must complete the [Suzhou: Research Achievement Record Form](#).

Research Performance Report (Levels C, D and Professor only)

13.8 A Research Performance Report is not applicable for education-focused, practice and international campus-based applicants.

13.9 For all other applicants, a Research Performance Report must be attached to a promotion application (refer to this [sample](#)). This report shows performance relative to the faculty-specific [research performance standards](#) over a set period of time.

13.10 Applicants can obtain their report by referring to [Requesting system generated academic promotion reports](#).

Student Evaluation Record

13.11 A Student Evaluation Record is not required if there is no education case.

13.12 The Student Evaluation Record lists the following data for the period since the last promotion/appointment to the current level:

- quantitative unit evaluation data (for each unit offering for which you were evaluated); and
- quantitative teaching evaluation data (SETU).

13.13 All SETU data must be included in the application for the period since the last promotion/appointment to the current level. Applicants are not permitted to choose which units to provide. Applicants can obtain a Student Evaluation Record by referring to [requesting system generated academic promotion reports](#).

Learning and Teaching Overview

13.14 A [Learning and Teaching Overview form](#) is required where there is a Student Evaluation Record. This document provides supplementary information to the Student Evaluation Record.

13.15 The applicant must list all teaching responsibilities (including teaching responsibility outside of the University), academic roles undertaken and indicate the responsibility for each area over the last 5 years or during the relevant promotion period, whichever is the lesser.

Summative Peer Review of Teaching

13.16 A Summative Peer Review of Teaching is not required if there is no education case.

13.17 Summative Peer Review of Teaching Report in the form of a 'Summary Report' must be attached to a promotion application (refer to this [sample](#)). Download instructions for the summary report is available [here](#).

13.18 To request a Summative Peer Review of Teaching, visit [PeerView.monash](#).

13.19 Peer Review must be completed in the year of applying for promotion. For applicants who are not teaching in semester one or two of the year of applying for promotion, they should contact the following:

- Australia faculty: the Faculty Deputy/Associate Dean (Education).
- Australia non-faculty: the [relevant promotion coordinator](#).
- International campuses: the Vice-President of Education of their campus

13.20 If there is an exemption from Peer review, the linked [Peer Review Exemption form](#) must be completed and attached to an application. A Summative Peer Review of Teaching Summary Report from the preceding year may be attached with the exemption form.

Optional Supporting Evidence

13.21 Applicants may include a maximum of five pages of supporting evidence. Examples of evidence for research and engagement include (but are not limited to):

- emails of acceptance of research publications 'in press';
- copies of media reports that provide evidence of impact of research; and
- letters of support acknowledging contribution and fit in the area of engagement and the academic unit.

Note: Refer to the [Monash Education Academy](#) for information on examples of evidence for education.

13.22 Supporting material must be relevant to the case and should be provided in at least 10-point font. Do not include photographs of award presentations and celebrations. Do not include solicited letters supporting your promotion application and it is not an academic curriculum vitae or an extension of the page limit.

14. Summary of attachments to the application

14.1 You are required to complete the [Case for Academic Promotion form](#) with the following attachments:

- Nominated outputs;
- Entire career publication list;
- Research Achievement Record;
- Research Performance Report (not applicable for promotion to Level B, education-focused or international campus-based applicants);
- Summative Peer Review of Teaching Summary Report (not applicable if there is no education case);
- Learning & Teaching Overview form (not applicable if there is no education case);
- Student Evaluation Record (not applicable if there is no education case); and
- Optional supporting evidence (maximum of five pages).

15. Lodging the application

15.1 Applicants will ensure their application meets the requirements detailed in these Instructions.

15.2 Completed and signed applications for promotion to Level B must be submitted via:

- the online form for [Monash University Australia](#) and [Monash University Malaysia](#); or
- email to suzhou@monash.edu for Monash Suzhou.

15.3 Completed and signed applications for promotion to Levels C, D and Professor must be lodged [online](#) by 5pm (AEDT) on the closing date of the promotion round. The university may not progress applications submitted that are incomplete or on an incorrect form (relevant year application form).

15.4 Any queries on the lodgement process should be directed to the [relevant promotion coordinator](#).

16. New Information

16.1 Applicants have one opportunity to present information (limited to a maximum of 2 pages) after lodging the application. This new information must be submitted no later than five weeks prior to the first committee meeting date of the level to which they are applying as communicated to applicants by their Promotion Coordinator at the relevant time. The [new information template form](#) must be used for this purpose. This form is attached to the communication to applicants.

16.2 The purpose of new information is to:

- to provide information that was not available at the time of application (e.g., new SETU data or grant outcome);
- correct or update information in the original application; and
- provide new information about a fact.

17. Interviews

17.1 Interviews normally last approximately 10 minutes, during which the Committee may explore the application, achievements, and vision/future in more detail. There are no set questions, each application and interview are unique.

17.2 Applicants are not permitted to present hard/soft/visual technology or presentations during their interview.

Note: Refer to Appendix C – Interview Guide for Academic Promotion Applicants

DEFINITIONS

Academic Performance Framework	A framework that articulates high level expectations for academic performance adopting a consistent approach across the three categories of Research, Education and Engagement, against which all academic performance will be measured. Further information is available on the Academic Performance Framework website .
Achievement(s) relative to opportunity	An evaluative framework in which the overall quality and impact of achievements is given more weight than the quantity, rate or breadth of particular achievements. Assessing achievements relative to opportunity involves considering circumstances, arrangements, career histories and overall time available. This in turn allows appropriate evaluation of achievements in relation to: <ul style="list-style-type: none"> • the quantum or rate of productivity, • the opportunity to participate in certain types of activities, and • the consistency of activities or output over the period of consideration. Achievement relative to opportunity is a positive acknowledgement of what a person can and has achieved given the opportunities available and is not about providing “special consideration” or expecting lesser standards of performance.
Assessor	An expert in the field able to offer a balanced and confidential independent assessment of the applicant’s standing in the field and of the merits of the application. Assessors may or may not be known personally to the applicant and should be nominated by the leadership member. Assessors are external to Monash University.
Education-focused applicant	An applicant for promotion who is employed on an education-focused contract of employment and is characterised by educational innovation and leadership in educational design and delivery.
Head of Unit	The head of an academic or organisational work unit, for example Head of School, Head of Department or where applicable, a person acting as nominee. If there are no heads of unit within the faculty, a Deputy Dean or equivalent may be delegated the head of unit’s responsibilities for the academic promotion process.
Executive Leader	An Executive Leader is the Dean of a Faculty, a Sub-Faculty Dean, Deputy Vice Chancellor, Director of Institute or Pro Vice-Chancellor of an international campus. The relevant Executive Leader is determined by your faculty, location or centre/institute reporting line. The executive leader for Indonesia fulfils the role of Head of Unit.
myPlan	An online performance planning tool that supports academic staff and supervisors to manage the performance development cycle, for Australia based staff.
Performance development plan	A plan that documents the annual work goals and career aspirations and development goals for the employee and the specific targets and progress towards achieving those goals. The performance development plan forms the basis for the annual performance planning and review cycle.
Practice applicant	An applicant for promotion who is employed on a practice contract of employment and will work/have worked within the relevant profession or industry and engaged specifically to bring their industry experience to the teaching effort of the University.

Pure	The University's research management software which provides information for Monash Australia staff on their grants, contracts, research outputs and research achievements.
Research Achievement Record	A report that details the applicant's research outputs, funding applications and awards, and HDR supervision during the relevant promotion period. For Australia campus based applicant, this report is generated via the University's Business Intelligence system.
Research Performance Report	A system-generated supporting research report from the University's Business Intelligence (BI) system which gathers data from a number of key University operational systems including SAP (Research Income), Callista (HDR Supervisions) and Pure (Research Outputs and Grants/Awards). This report shows performance relative to the Faculty specific research performance standards over a set period of time.
Research-only applicant	An applicant for promotion who is employed on a research-only contract of employment and who is appointed to undertake predominately research and research-related activities.
Student Evaluation Record	A record of an applicant's student evaluation results for units/unit offerings in which the applicant has had a teaching role and will cover the period relevant to the promotion application. The report is generated by the Evaluations Team within Insights, Planning & Performance and is requested via their website. The report will not contain Monquest data. This data may be available and can be requested by Committees via the relevant promotion coordinator if required.
Summative Peer Review of Teaching	A report based on the observation of an applicant's teaching which notes observed aspects of educational practice and infers evidence of teaching effectiveness.

ADMINISTRATION

Parent policy	Probation, performance and promotion
Parent procedure	Academic Promotion
Framework owner	Director, Workplace Relations
Date effective	12 July 2025
Review date	1 year from effective date
Version number	4.0

APPENDIX A – APPLICANT PROMOTION APPLICATION CHECKLIST

- Discuss intent to apply with the performance supervisor
- Check eligibility under the [Academic Promotion Procedure](#).
Note: Research-only applicants will need to confirm with the relevant grant holder and/or the Research Office and/or head of unit that there is funding available for a promotion.
- Read the following documents:
 - [Academic Promotion Procedure](#);
 - [Academic Promotion Application Instructions](#);
 - [Case for Academic Promotion](#);
 - The [Academic Performance Framework](#)
- Further discuss your intention to apply with (as relevant):
 - Executive Leader (if you are seeking promotion to Level E);
 - Associate/Deputy Dean (Research); and
 - Associate/Deputy Dean (Education).**Note:** You should seek advice and consult widely from the above-mentioned staff members as well as other senior academic colleagues/mentors and are confident that you are applying for promotion at an appropriate stage of your academic career.
- Advise the [relevant promotion coordinator](#) of your intention to apply.
- Register for and attend the relevant [information session](#) (as appropriate) and watch the support [video resources](#).
- Check and diarise [key dates](#)
Note: Diarise key dates, including committee interview dates. For level E applicants, ensure all dates are placed on hold until further notification.
- Check that your profile in Pure is up-to-date
- Request a Research Achievement Record
- Request a Research Performance Report (where relevant)
- Request your Student Evaluation Record
Note: Not required if there is no education case to assess
- Download your Summative Peer Review of Teaching Report (Summary Report)
Note: Not required if there is no education case to assess
- Complete the [Case for Academic Promotion form](#)
Note: Complete and sign all relevant sections in your application, following the instructions on page 1 of the form and the [Application Instructions](#).
Note: Allow your performance supervisor and head of unit enough time to complete their sections of your application form.
- Prior to submitting your application form, check:
 - You have used the correct year form
 - You comply with the page limits
 - All sections have been completed and signed by all parties
 - You have all the required supporting reports/documents
 - You have completed the applicant declaration
- Convert all documents individually to PDF format
- Submit the application by the [round closing date](#)
- Where relevant, complete a [new information template form](#) and send it to the [relevant promotion coordinator](#) by the requested final due date.
- Prepare for an interview (where relevant)

APPENDIX B – PREPARING RELEVANT CIRCUMSTANCES FOR PROMOTION

In support of the University's Equal Opportunity Policy and our commitment to gender equity, inclusion and diversity the University academic promotion procedures, the University provides an opportunity for staff to include details of their relevant personal, professional or other circumstances for consideration.

To facilitate a fair and equitable assessment of an application relative to the stage of career, we encourage staff to specify any career impacting circumstances to enable an assessment of achievement relative to opportunity.

In response to COVID-19 the education, research and engagement contributions of many academic staff have been affected. The University is committed to appropriately recognising the extra contributions to teaching in 2020 and 2021 because of COVID19 and Faculties will work to ensure this is achieved through considering the effects of COVID-19 relative to opportunity. In addition, the research contributions of some staff have been profoundly affected by COVID19. The University will ensure COVID19 related impacts, relative to opportunity, will be understood and recognised for the purposes of academic advancement, probation and performance.

Achievement(s) relative to opportunity is the framework that supports a fair and equitable assessment of career progression and achievements over a period of time given the opportunities available to staff.

This framework assists to ensure that the overall quality and impact of achievements is given more weight than the quantity, rate or breadth of particular achievements relative to their personal, professional and other circumstances. More specifically, this provides for the appropriate evaluation of achievements in relation to:

- the quantum or rate of productivity,
- the opportunity to participate in certain types of activities, and
- the consistency of activities or output over the period of consideration.

Achievement relative to opportunity is a positive acknowledgement of what a staff member can and has achieved given the opportunities available to them and results in a more calibrated assessment of their performance. It is not about providing "special consideration" or expecting lesser standards of performance.

Identifying Circumstances Impacting Opportunities

Relevant circumstances may include (but are not limited to):

Personal Circumstances

A career disruption caused by personal circumstances that involves a prolonged interruption or poses a significant impact to a staff member's capacity to work.

This includes, but not limited to; disruptions caused by parental leave, major illness/injury, carer responsibilities, disability, and personal trauma.

Professional Circumstances

A staff member's track record and associated productivity relative to stage of career, including consideration as to whether productivity and contribution are commensurate with the opportunities available to them.

This includes, but not limited to; periods of part-time work, country relocation, late or non-linear entry in academia, cultural expectations, varied workload or relocation of a research laboratory or clinical practice setting or other similar circumstances that impact upon productivity.

Other

Other may include elements outside the control of a staff member. Provide a brief summary of the circumstances.

Staff are not required to describe specific details about sensitive issues such as a medical illness. Where it is important to share sensitive details of the relevant circumstances to be accurately understood, staff may share this information in their written case or have a private discussion with the Chair or Chair's Nominee (for applications to Levels C-E) or the Approver (for Level B applications). Contact your [relevant promotion coordinator](#) for more information.

This includes, but not limited to

- natural disasters such as flooding, bushfires, storms and earthquakes;
- global health issues such as the COVID-19 pandemic; and
- other emergency situations

Monash recognises that some elements are outside our control (described above) and may impact the delivery of the education, research and engagement activities of our staff. Monash understands the need to recognise these impacts and we will consider a staff members' achievements relative to opportunity.

Completing a Case for Promotion Form

Staff who have experienced personal, professional or other circumstances that have had an impact on their opportunities to pursue academic achievements can feel at a disadvantage in applying for academic promotion. When preparing a case for promotion, staff should be careful not to overstate their situation; only claim genuine circumstances that can be supported by detailing the impact on research and research achievements, education and/or engagement and associated productivity. Refer to section 6 of the [Academic Promotion Application Instructions](#) for further information.

Staff should provide the following in their case for promotion:

- A brief explanation of the type of personal, professional or other circumstance
Provide a brief summary of the circumstances. Staff are not required to describe specific details (such as the tasks undertaken as a primary carer). Staff are not required to describe specific details about sensitive issues such as a medical illness where the staff members feels uncomfortable to do so. Where it is important to share sensitive details for the relevant circumstances to be accurately understood, the staff member can have a private discussion with the Chair or Chair's Nominee. For Level B applications, this discussion would be with the approver(s).
- Nominate the period(s) of the disruption/circumstance (approximate dates);
For some staff, it may be useful to include a visual representation (such as a table) to assist the explanation. An example where this can be particularly effective is for a reduced (part-time) fraction which has changed over the relevant assessment period (since appointment to current level). Staff can then easily link this to their answer in (c and/or d).
Example of reduced fraction:

Period	Appointment Fraction	Working Months
January 2020 - August 2020	1.0 (full time)	1.0 x 8 = 8
September 2020 - December 2022	0.6 Fractional Appointment	0.6 x 28 = 16.8
January 2023 - October 2023	0.8 Fractional Appointment	0.8 x 10 = 8.0
		TOTAL 32.8

This shows that over a period of 3 years and 10 months (46 months), this staff member worked an equivalent of 32.8 months (approximately 2.7 years). The expectations of their performance can then be considered accordingly.

- Outline the impact this has had on research and research achievements, education and/or engagement and associated productivity relative to stage of career
Staff should focus this answer for the period of time being considered in the application (i.e., since their last promotion or appointment). If desired, briefly comment on the overall career history and trajectory in light of the opportunities available.
- Provide a positive acknowledgement of what has been achieved given the opportunities available

In addition to above staff may wish to compare their own career achievements to benchmark data if this is available, on a pro-rata basis. Staff may find a visual representation helpful. In the example below, a staff member employed on a reduced fraction over the relevant period of time can provide information on the number of publications produced during the same time frame. This enables decision-makers to assess achievement relative to opportunity by comparing the relevant faculty or discipline-specific research performance standards and outputs on a pro-rata basis. The decision makers recognise that this is a simplistic representation, since it is not just about quantity but also about quality, but it is a helpful start to adjusting expectations of 'metrics'.

Visual example of performance (for reduced fraction included above):

Year	Books	Journals	International refereed conference publications	National refereed conference publications	Total publications
2020		2		1	3
2021	1	2	1	2	6
2022			3	3	6
2023		3	2	2	7

Staff may link the table to the research performance metrics if this would help the explanation for how they are meeting expectations on a pro-rata basis.

Can Staff Reference their Overall Career?

Unlike some other areas of the case for promotion form, staff may refer to their overall career history and trajectory to clearly demonstrate their achievements over time, beyond just the period since their last promotion/appointment to current level. However, it is important to focus on the case for promotion period.

How Information Is Used

The relevant Committee or Approver (or nominee) will be in a better position to make fair and valid judgements and assess achievements relative to opportunity if it is aware of the particular circumstances relevant to an applicant's career achievements and progression. The Committee or Approver will evaluate the achievements of the applicant in light of the opportunities available whilst ensuring that the indicators of quality and impact of achievements have been demonstrated.

Further information regarding [assessment of achievement relative to opportunity](#) is available on Monash HR website.

The information is collected for the primary purpose of assessing your application for academic promotion. Information contained within applications to Level C, D and Professor will be disclosed to University-nominated external assessors for assessment purposes (see [Academic Promotion Procedure](#)).

If you wish to inquire about the handling of your personal information, please contact the University Privacy Officer at privacyofficer@monash.edu.

Support available

Where a staff member feels they would benefit from support, please contact the University's [Employee Assistance Program](#), which offers free and confidential counselling and support services.

Examples

The following are some examples to assist staff in submitting their achievements relative to opportunity. Please note that these are examples only and that staff should tailor their content to their own particular experiences and opportunities.

Example 1: Primary Carer

If staff have been employed for ten years but had a career break of two years to be the primary caregiver of a child or children, the promotion committee should consider the staff member's achievements over an eight-year period. Demonstrate the achievements relative to opportunity available during this time.

Staff might like to add any opportunities or invitations to speak at key note conferences they have not been able to take up because of carer responsibilities. This provides tangible evidence particularly if staff provide details of the conference.

Example 2: Part Time Work

If staff have had periods of leave or worked part-time in the period under consideration for promotion, provide a calculation of the effective full-time equivalence. For example, if between August 2015 and December 2020 a staff member worked at 0.6 FTE, then for this period (5.25 years) their FTE was 3.2 years.

Staff could then compare their opportunity for achievement against that of a full-time staff member (100% opportunity) and accordingly demonstrate their achievement on a pro-rata basis. For example, if the staff member worked at .5 FTE and produced 1 paper, this would be equivalent to a full-time worker producing 2 papers during the same period.

It would be advantageous to then include the difference in the relevant academic performance standards in that academic area (e.g. quantitative research targets) to show what would be expected at their average service fraction, over the years under assessment for promotion.

Example 3: Reduced Opportunity

If a staff member worked full-time but their opportunity to achieve has been affected by factors that prevented them from engaging in afterhours activities (for example, attending international conferences), the staff member may wish to demonstrate that rather than attending international conferences, they supervised a greater number of postgraduates or increased collaboration with colleagues, or took on additional roles such as editorial responsibilities. Provide details of the career progression.

Example 4: Varied Workload Allocation

If the staff member had varied their workload allocation during the period under consideration for promotion, they may describe their workload allocation over this period. For example, in the current year the staff member was a teaching and research academic with 40% research, 40% education and 20% engagement. This was not reflective of their workload allocation and their efforts over the period under assessment. Over the relevant period since appointment/promotion to their current level, they received a research grant (e.g. NHMRC, ARC

Fellowship) and were employed on a research-only contract of employment with a workload of 80% research and 20% engagement for the previous 4 years. The staff member may wish to describe that although their current workload includes 40% in education, their overall education case is different, given reduced opportunity in education and focus on their grant. Explain how this has changed the expectations and impact of their education case over the relevant promotion period.

Example 5: Varied Workload Allocation (Leadership Role)

If a staff member had varied their workload allocation during the period under consideration for promotion, they may describe their workload allocation over this period. For example, in the current year they were a teaching and research academic with 40% research, 40% education and 20% engagement. Over the relevant period since appointment/promotion to their current level, they were a Head of Unit with 10% research 10% education and 80% in engagement for the previous 5 years (during the period under assessment). The staff member may wish to describe that although their current workload included 40% in research and 40% in education, their overall education case is different, given reduced opportunity in education. Explain how this current workload allocation does not give an indication of the focus of the role over the assessment period. The expectations for the research and education case over the relevant promotion period are entwined with the role as Head. The staff member's case is made on the basis of significant emphasis on the impact that leadership has had on the University, community/discipline rather than the expectations of a more standard 40/40/20 workload allocation.

Example 6: Covid-19

If a staff member has been adversely affected by COVID-19, they may wish to discuss the influence this has had on their achievements. For example, they are a teaching and research academic at the time of COVID-19. Due to the travel and distancing restrictions, they had been unable to continue their laboratory-based research and present at international conferences which has significantly reduced their research and engagement output. Given this, they have had to turn their attention to education by developing high quality, online learning for their students. As part of this, they produced resources which encouraged student engagement, participation and collaboration in a virtual environment which was later implemented by other members of their department. This approach helped to promote their performance against the Education Performance Standards and was reflected in SETUs, student results and student feedback.

Example 7: Traumatic event

If a staff member has experienced or witnessed a significant traumatic event such as a car accident, house fire, or natural disaster (e.g., earthquake, flood, or bushfire), even if they are physically unharmed, the psychological impact can be profound. Potential Impacts from the event could include: post-traumatic stress symptoms, such as flashbacks, hypervigilance, or sleep disturbances, which can impair focus and productivity; displacement or loss of personal property, which can disrupt access to teaching materials, research data, or a stable work environment; increased caregiving responsibilities, if family members are also affected or injured; or reduced capacity to engage with students or colleagues, due to emotional exhaustion or the need for time off to recover.

APPENDIX C – INTERVIEW GUIDE FOR ACADEMIC PROMOTION APPLICANTS

Interviews allow the committee to clarify information contained in an application and for applicants to answer relevant questions.

Who will be interviewed?

- Applicants for Level D or Professor will be interviewed.
- Applicants for Level C may be interviewed at the Chair's request..
- Applicants for Level B will not be interviewed.

It is the applicant's responsibility to be available for [all dates](#) on which the relevant committee meeting is held. Individual requests for a specific interview date or time will not normally be met.

Applicants attending an interview will have the opportunity to verbally update the committee on the day. The Committee will not accept new information, whether in hard or soft copy, presented outside this process (including during an interview with the Committee using audio-visual technology).

Preparing for interview

The interview will be short, usually around 10 minutes. In the interest of time, there is usually no introduction made on the day. You will be provided with a list of committee members and are advised to familiarise yourself with the name of Committee members.

There is no set structure for interviews and the Committee may choose to ask specific questions about the case for promotion. It is recommended that applicants be prepared to answer questions such as:

- What is your vision for research/education/engagement?
- Are you able to tell the committee what you have done in your field and where you are going?
- What is the key question in your field and how are you addressing it?
- What will you do differently next year?
- How will you make the transitional lift?
- What would you like your legacy to be?
- What is your vision for your own leadership?

It is recommended that applicants:

- Familiarise themselves with the membership of the committee;
- Maintain familiarity with their application;
- Bring a copy of their application to the interview (in the event that applicants need to refer to it);
- Be aware that applicants may be asked to briefly state their case or the committee may ask questions in order to clarify aspects of the case;
- Listen to the questions being asked and answer the questions clearly and concisely; and
- Be well prepared and take the opportunity to highlight the strengths of the application.

On the Day

Please arrive at the nominated venue or enter the Zoom waiting room, 5 minutes prior to your interview time. You are asked to be available 30 minutes prior to the allocated time slot in the event the committee runs ahead of time.

To ensure the committee runs smoothly, applicants must provide their mobile number to the Promotion Coordinator so that they can contact applicants in the event of small changes to scheduled interview times.

Additional Support and Materials

A video of a mock interview staged by a small version of a promotion committee with a small number of promotion applicants was facilitated by Professor Matthew Gillespie, Vice-Provost (Academic Affairs). This session is available on the [academic promotion website video resources page](#) to help you prepare for your interview.