Post Tenure Review Evaluation Workshop

Mary Pons, M.A.
Overview

• Post Tenure Reviews (PTR)
  – What they are
  – When they occur
• Required documents for PTR portfolio
• Review Committees
• FAR website resources
• Interfolio Introduction
• Interfolio Demonstration
Post Tenure Reviews (PTRs)

• What they are
  – PTRs are a periodic review that occurs every five years after the awarding of tenure
  – It is a formal process to consult with colleagues and encourage continued excellence
  – New version of UPS 210.020 implemented 7/1/19

• When they occur
  – Every five years after the awarding of tenure
  – Tenured Associate Professors may apply for promotion to Professor instead
  – The PTR portfolio is submitted on October 1st, of the Fall semester at the beginning of the 5th year
Required Documents for PTR Portfolios

• PTR Portfolios consist of three types of documentation
  – An updated Curriculum Vita
    • Your Vita should document the entirety of your career here at CSUF especially:
      – Teaching (or the equivalent for Librarians & Counselors)
      – Scholarship/Creative Activities
      – Service
  – SOQ Data
    • This data should cover all courses taught over the evaluation period
    • Include BOTH the Statistical Summaries & the Comment Reports
  – Narrative Summary
    • Maximum Length = 2 pages
    • Should outline the Faculty member’s significant achievements during the period of review and goals for the next five years
Summary of Review Process

• Department Chair receives the PTR portfolio from the candidate (Interfolio packet and signed form) and declares it complete

• Post Tenure Review Committee (PTRC) consists of the Chair and one member from the elected Department Personnel Committee
  – If the Chair is scheduled to undergo a PTR, then two members of the DPC will be selected and one of them will be the “PTRC Chair”

• The Dean will have simultaneous access to the PTR portfolio along with the PTRC
Summary of Review Process (cont’d)

• Both the PTRC and the Dean will generate a written statement commenting on the candidate’s strengths and weaknesses
• The Dean will distribute copies of both written statements to the candidate
• After the candidate meets with the Chair and the Dean, a 10-day rebuttal period commences
• At the end of the cycle, the evaluated PTR portfolio is given to FAR for archiving in the PAF
Journey of the PTR Portfolio

Step #1
• PTR Portfolio Submitted on 10/1 via Interfolio

Step #2
• Department Chair or PTRC Chair declares complete

Step #3
• Department Chair Forwards PTR portfolio to Review level

Step #4
• PTRC & Dean evaluate PTR portfolio. Dean provides written statements to candidate

Step #5
• Candidate meets with Chair & Dean. 10-day rebuttal period administered

Step #6
• Dean Forwards the PTR portfolio to FAR for Archiving
FAR Website Resources

- FAR’s website underwent a massive makeover during the Spring and Summer 2019 semesters
- There is now a page dedicated specifically to Post Tenure Reviews
  - PTR (No Promotion Consideration)
  - This page also contains links to
    - Interfolio Tutorials
    - UPS 210.020
    - Upcoming workshops and other events on the FAR calendar
Interfolio Introduction

- Interfolio is an electronic evaluation system utilized by 18 of the CSU campuses
- As CSUF faculty members, you have access to two Interfolio products
  - **Review, Promotion, and Tenure** (an email will be sent to you when your case is ready)
    - This is where all PTR materials will be uploaded
    - Accessible through the CSUF Faculty portal or [https://account.interfolio.com/login](https://account.interfolio.com/login)
    - This product is signified by the Cal State Fullerton logo on the Log-in Screen
  - **Dossier**
    - This is secure storage system where you can store your materials in preparation for upcoming reviews
    - Documents stored in Dossier **CANNOT** be viewed by your review committees until they are uploaded to an active Interfolio review packet and all sections in that packet are **"SUBMITTED"**
Interfolio Vocabulary

• **Portfolio** – refers to a collection of documents that faculty members submit to a set of overseeing committees for evaluation
  – Examples of Committees are the Department Chair, Dean, & PTRC
• **Case** – refers to the most current review packet created for a faculty member, where he or she can upload WPAF documents and where Review Committees will evaluate all submitted materials.
• **Review Packet** – An electronic repository for submitted evaluation documents, split into different document types/information sections.
  – This can refer to both past and present cases
• **Review packet section** – refers to a specific category of documents that a faculty member submitted as part of a whole, for evaluation
• **Completed Student Opinion Questionnaire Forms** – refers to a specific SOQ document type available in the SOQ faculty app on the Titan Portal, known as “raw data”
  – For classes that distributed SOQ surveys electronically, instead of hard copy, there is **NO** “raw data” file type
  – Raw data for electronically-distributed surveys can be supplemented by the “Comment Report” for each class
Interfolio Tips

• Tutorials Available on all evaluation pages on the FAR website, www.fullerton.edu/far
  – How to Log in
  – How to find your review packet/case
  – How to Add New Documents to your review packet/case
  – How to Add documents from Dossier to your review packet/case

• Use the most up-to-date Chrome, Firefox, or Safari browser
  – Interfolio will NOT load in Internet Explorer (IE)

• Organize all of the documents you are planning to submit for evaluation into a filing system that makes it easy to track what you have uploaded and what you need to upload
  – Only after you have created the system above do you create your Table of Contents

• Use a clear and logical document naming convention, so that reviewers can determine the content of each document from the name alone
Interfolio Tips (cont’d)

• Do not use any highlighting, notes, or tags in Adobe as this will affect legibility
  – You can input such formatting in Microsoft word and then convert it to a PDF and the formatting should carry over

• **Word of Caution: do not submit your portfolio without previewing case and double checking the formatting of ALL your uploaded documents**
Interfolio Demonstration

• There are two methods to log into Interfolio
  – #1 going through the faculty portal:
    https://my.fullerton.edu/Portal/Dashboard/
    • Can also access SOQ data from here
  – #2 going directly to the Interfolio Log-in Page (make sure to bookmark as a favorite):
    https://account.interfolio.com/login
Faculty Affairs and Records

Ed Collom, Ph.D.  
Director (x2778, edcollom)

Mary Pons (x3705, mpons)  
RTP Analyst

Nicole Calucag (x8003, ncalucag)  
SOQ Analyst

Kelly Marconi (x8593, kmarconl)  
RTP Coordinator