Overview

• RTP Schedule, Tips, and Vocabulary
• RTP Performance reviews
  – Full Reviews
  – Abbreviated Reviews
• FAR’s Online Resources
• Exceptions to the Normal RTP Process
• Interfolio Tips
• Interfolio Demonstration
Retention, Tenure, and Promotion Schedule

PY1 (OR 1st Year of employment): Prepare prospectus

PY2 (OR 2nd year of employment): 1st full-performance review

PY3: 1st abbreviated review (unless full required by Provost)

PY4: 2nd full-performance Review

PY5: 2nd Abbreviated review (unless full required by Provost)

PY6: 3rd full-performance review for Tenure & Promotion

5th year in tenured Associate Rank: full-performance Review for Promotion to Professor or Post-Tenure review
Tips to Make the RTP Process Easier

• **Start early**
  – Don’t wait until the week or day before everything is due to start working
  – Check your fullerton.edu inbox regularly, for emails from FAR or noreply@interfolio.com
  – All RTP Portfolios are REQUIRED to be submitted through Interfolio
    • Interfolio Server traffic is at its most congested on deadline day, which will cause the Interfolio platform to slow considerably
• Find out who you should talk to about what makes a good portfolio for Faculty in your department
  – This can be your Department Chair, Faculty mentor, or even a friend amongst your colleagues, **but NOT the FAR Office**
• Read your DPS document from cover-to-cover
Departmental Personnel Standards (DPS)

• This document is the basis of all Retention, Tenure, and Promotion evaluations and recommendations

• “These standards... ...shall indicate the specific range of activities and levels of performance necessary to meet requirements for positive retention, promotion, and tenure decisions” (UPS 210.002)

• [Departmental Personnel Standards webpage](#)
  – These standards will be the most useful in answering questions or providing direction about preferred style or content of RTP portfolios
RTP Tips Cont’d

• Download, analyze, and refer to copies of UPS 210.002, UPS 210.000, and the FAR RTP timetables
• Determine if any scholarship from pre-employment can count
  – Applies only to Faculty with Service Credit granted upon hire
• FDC: Participate in workshops, initiatives, and social events
• Keep balance in mind
• Document everything
• Assemble RTP materials each semester, to keep things from becoming overwhelming when assembling your portfolio
Acronyms for the RTP Process

• **R T P** – Retention, Tenure, & Promotion

• **F A R** – Office of Faculty Affairs and Records
  – Record keepers and overall Interfolio managers

• **F D C** – Faculty Development Center
  – Best resource for narrative construction and editing, for Faculty undergoing review

• **F P C** – Faculty Personnel Committee
  – An appellate evaluation committee, which only oversees cases that have negative or conflicting recommendations from previous review levels

• **A T C** – Academic Technology Center
  – On campus resource for computer or Titan Portal help

• **D P C** – Department Personnel Committee
  – Colleagues who perform a peer evaluations of all Faculty portfolios under review

• **S O Q** – Student Opinion Questionnaires
  – Surveys administered to students, close to the end of the semester, for each class they are enrolled in
RTP Vocabulary

- **Portfolio** – refers to a collection of documents that Faculty members submit to evaluators.
- **Interfolio Case** – refers to the most current review packet created for a Faculty member, is the Interfolio equivalent of “Portfolio”.
- **Interfolio Review Packet** – An electronic repository for submitted evaluation documents, split into different document type/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 WEB SOQ surveys, instead of hard copy, there is **NO** “raw data” file type.
  - The SOQ Comment Report for each class serves as the substitute for raw data when WEB SOQ surveys are used.
Period of Review

• For Full Reviews
  – All full-performance reviews are CUMULATIVE
    • Covers the time period from the date of hire to the date of submission for your current RTP portfolio
  – All documentation submitted for a full-performance review should also reflect that timespan

• For Abbreviated Reviews
  – Abbreviated reviews are **NOT** cumulative
  – These reviews cover the time span between the day after your last RTP portfolio was submitted through the date your current RTP portfolio will be submitted
    • Covers the timespan of 2 semesters or 1 academic year
  – All documentation submitted for an abbreviated review should reflect the 2 semester timespan
RTP full-performance Reviews

- For Probationary or Tenure-track Faculty
  - full-performance reviews occur normally in probationary years 2, 4, & 6
    - They can also be mandated by the Provost in years 3 & 5
  - For those undergoing their 1st full-performance reviews
    - Submission deadline: September 15, 2020
  - All other full-performance reviews
    - Submission deadline: October 1, 2020

- For Tenured Faculty undergoing Promotion consideration to Full Professor
  - To participate in or opt-out of this type of full-performance review, you must submit a hard copy of the completed Promotion declaration form to FAR.
    - Submission Deadline: September 4, 2020
  - RTP Portfolio Submission deadline: October 1, 2020
  - The normal time to apply for promotion is at the beginning of the 5th year in Associate rank
  - A Faculty member may withdraw from this process at any time up until May 1st
Assembling the RTP Portfolio for a Full-Performance Reviews

• Start Early, all RTP portfolios are **REQUIRED** to be submitted through Interfolio
  – If any documents are not digitized, digitize them immediately
• Sort your documents first by category type and then in **REVERSE** chronological order
  – Newest documents on top, oldest on bottom
  – [Template for Interfolio full-performance review](#) – outlining all 26 categories
• RTP portfolio Table of Contents: **Complete this document last**
• RTP Checklist Form:
  – A signed **HARD COPY** of this document is due to your Department Chair by the Portfolio Submission deadline
• CSUF Titan Portal contains:
  – Statistical Summaries of Student Opinion Questionnaires (Statistical Course Reports)
  – Completed Student Opinion Questionnaire Forms (Raw Data)
  – Statistical Summaries of Grade Distributions (Graded Class Lists)
Journey of the full-performance RTP Portfolio

Step #1  • Chair declares complete after submission of Checklist and Portfolio

Step #2  • Chair forwards portfolio to departmental review stage (independent evaluations by Chair and DPC)

Step #3  • Chair presents Faculty member with Chair evaluation and DPC evaluation and recommendation

Step #4  • Faculty member acknowledges receipt and declares whether a rebuttal will be submitted within 10 days

Step #5  • Chair presents Faculty member with Chair recommendation

Step #6  • Faculty member acknowledges receipt and declares whether a rebuttal will be submitted within 10 days

Step #7  • Portfolio is forwarded to Dean who reviews and then presents Faculty member with Dean evaluation and recommendation

Step #8  • Faculty member acknowledges receipt and declares whether a rebuttal will be submitted within 10 days

Step #9  • Dean forwards portfolio and Candidate Binder/Folder to FAR for final auditing & FPC assessment

Step #10  • FAR Forwards portfolio and Candidate Binder/ folder to Provost for Final Decision

Step #11  • Final decision letter is delivered to Faculty campus mailboxes by FAR
RTP Abbreviated Reviews

• Normally occur in Probationary year 3 & 5
  – Please note: a full-performance review can occur in probationary years 3 & 5 if:
    • The Provost mandates it in your decision letter
    • You decide to apply for Early Tenure and/or Early Promotion
  – RTP Portfolio Submission Deadline: **October 1, 2020**
  – [Template of Interfolio Abbreviated Review case](#) – outlining the 3 required categories

• There is no rebuttal period for this type of review
  – You will receive copies of the statements your review committees composed about your progress towards tenure at the end of the cycle

• An Abbreviated Review can only result in an additional probationary year
Assembling Working Personnel Action File

• **Start Early**, all RTP portfolios are **REQUIRED** to be submitted through Interfolio
  – If any documents are not digitized, digitize them immediately

• Sort your documents first by category type and then in **REVERSE** chronological order
  – Newest documents on top, oldest on bottom

• **RTP Abbreviated Checklist Form**:
  – A signed **HARD COPY** of this document is due to your Department Chair by the Portfolio Submission deadline

• **CSUF Titan Portal contains**:
  – Statistical Summaries of Student Opinion Questionnaires (Statistical Course Reports)
  – Completed Student Opinion Questionnaire Forms (Raw Data)
  – Statistical Summaries of Grade Distributions (Graded Class Lists)
Journey of the Abbreviated RTP Portfolio

Step 1
• Chair declares complete after submission of Checklist and Portfolio

Step 2
• Chair forwards portfolio to departmental review stage (independent evaluations by Chair and DPC)

Step 3
• Chair and DPC produce written statements about Candidate’s progress towards tenure and recommendations for the next year

Step 4
Department chair forwards portfolio to the Dean

Step 5
• Dean produces written statements about Candidate’s progress towards tenure and recommendations for the next year

Step 6
Dean Forwards Portfolio to FAR for Final Auditing

Step 7
• FAR forwards the Portfolio to the Provost for the final Decision

Step 8
Final Decision Letters delivered to Faculty campus mailboxes by FAR
### Possible Outcomes of the RTP Process

<table>
<thead>
<tr>
<th>RTP Status</th>
<th>Positive Outcome #1</th>
<th>Positive Outcome #2</th>
<th>Negative Outcome</th>
<th>Decision Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PY2</td>
<td>An Abbreviated Review</td>
<td>A full-performance review</td>
<td>Non-retention</td>
<td>February 15&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>PY3 (Abbreviated)</td>
<td>A full-performance Review</td>
<td></td>
<td></td>
<td>March 15&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>PY3 (Full)</td>
<td>A full-performance Review</td>
<td></td>
<td>Terminal Year</td>
<td>June 1&lt;sup&gt;st&lt;/sup&gt;</td>
</tr>
<tr>
<td>PY4</td>
<td>An Abbreviated Review</td>
<td>A full-performance review</td>
<td>Terminal Year</td>
<td>June 1&lt;sup&gt;st&lt;/sup&gt;</td>
</tr>
<tr>
<td>PY5 (Abbreviated)</td>
<td>A full-performance Review</td>
<td></td>
<td></td>
<td>March 15&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
<tr>
<td>PY5 (Full)</td>
<td>A full-performance Review</td>
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<td>Terminal Year</td>
<td>June 1&lt;sup&gt;st&lt;/sup&gt;</td>
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<tr>
<td>Promotion to Full Professor</td>
<td>Promotion to Full Professor</td>
<td>No Promotion</td>
<td></td>
<td>June 15&lt;sup&gt;th&lt;/sup&gt;</td>
</tr>
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</table>
FAR’s Online Resources

• FAR’s website now contains pages specifically for Tenure-track and Tenured Faculty. These have been reorganized to have nearly identical information on them to:
  – Lessen the confusion surrounding the RTP process
  – Keep you, the Faculty informed of upcoming events
  – Provide a clearer display of all pertinent documentation that the FAR office has to offer, to better aid you in the RTP process
  – Tenure-Track Faculty
  – Tenured Faculty

• FAR has also prepared new pages for blank SOQ forms and Departmental Personnel Standards
  – SOQs
  – Departmental Personnel Standards (DPS)
Screenshots of the New Pages

Tenured Faculty Page

Promotion
TENURED FACULTY - PROMOTION TO PROFESSOR (OR EQUIVALENT)
Fall 2020 Portfolio Submission deadline: **10/1/2020**

This review is considered to be a full-review, and like full-reviews in the tenure-track process, this review is cumulative.

Candidates for 2020-2021 actions are to submit their materials through Interfolio, the evaluation system implemented in 2017-2018.

Promotion of a tenured faculty member shall normally be considered during the fifth year in rank, with promotion effective at the beginning of the sixth year. Applying prior to completing four years of service as an Associate Professor, Associate Librarian, or SSP-AR II Counselor is considered applying for early promotion.

The template that candidates undergoing full performance reviews will use mirrors the requirements of UPS 210.002 and is listed below in the Templates Section. This page also provides several different types of resources to aid and assist in the compilation of the RTP Portfolio.

Probationary Faculty Page

Retention, Tenure, and Promotion (RTP)

Probationary faculty members are normally given a two-year initial appointment and are subject to evaluation before they are reappointed to subsequent probationary years or granted tenure. Tenure-track faculty are considered probationary faculty until they are awarded tenure or terminated.

Candidates for 2020-2021 actions are to submit their materials through Interfolio, the evaluation system implemented in 2017-2018. The template that candidates undergoing full performance reviews will use mirrors the requirements of UPS 210.002. Interfolio is accessible through the Faculty Portal (for assistance see how-to login video).

For more information on RTP, please see the slides from our latest candidate workshops.

For Counselors (CAPS) and Library Faculty there are some documents that are specific to their portfolios and they are noted below.
Exceptions to the Normative RTP Process

- Faculty members with Service Credit
  - This would have been granted upon hire, would be listed in the hiring contract, and is a maximum of 2 years
    - The Prospectus is still completed in first year of employment and candidates undergo full-performance review the next year
  - With 1 Service Credit year awarded, candidates are classified by FAR as PY2-NR or Probationary Year 2 Faculty – No Review
    - These Faculty have back-to-back full reviews in years “3” and “4”
  - With 2 Service Credit years awarded, candidates are classified by FAR as PY3-NR or Probationary Year 3 Faculty – No Review
    - These Faculty undergo full reviews in years “4” and “6” in sync with the normal cycle
- Early Tenure and/or Early Promotion to Associate Professor
  - The DPS will have criteria for how to achieve Early Tenure & Early Promotion
- Early Promotion to Professor
  - The DPS’ will have criteria for how to achieve Early Promotion to Professor
Early Tenure and Early Promotion

• After one year of service, a probationary Faculty member may request Early Tenure and Early Promotion consideration.

• To receive Early Tenure and Early Promotion, all expectations for the probationary period must be satisfied and performance in both teaching and scholarly and creative activities must exceed expectations.

• Possible outcomes are:
  – Tenure and promotion to Associate Professor
  – Promotion to Associate Professor without tenure
  – An additional probationary year
  – A terminal year
Early Promotion to Professor

• After one year of service at the Associate rank, a Faculty member may request Early Promotion
  – Applying during fifth year in tenured Associate rank is normative

• To receive Early Promotion, performance in all three areas of review shall be at the level of Excellent (this definition is department-specific)

• Possible outcomes are:
  – Promotion to Professor
  – No promotion to Professor
Interfolio Introduction

• Interfolio is an electronic evaluation system utilized by many of the CSU campuses, they are also a 3rd party vendor with whom CSUF has a contract
  – ALL RTP portfolios are required to be submitted through Interfolio
• As CSUF Faculty members, you have access to 2 interfolio products
  – Review, Promotion, and Tenure (an email will be sent to you when your case is ready)
    • This is where all WPAF materials will be uploaded
    • Accessible through the CSUF Faculty portal or 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”
• Relevant Tutorials
  – How to log in
  – How to use Dossier
Interfolio Tips

• For Technical issues, contact the Interfolio Help Desk:
  – Email: help@interfolio.com
  – Phone: (877) 997-8807

• 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) or Microsoft Edge

• 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.

• Don’t be afraid to click things while in working in Interfolio
  – Any permanent changes to your packet, like submission or deletion of uploaded materials will **ALWAYS** require confirmation

• In sections where you have to upload more than one document, like the ones that require SOQ data, upload documents in small batches
  – This way you can re-arrange documents in smaller batches rather than one big batch

• Do **NOT** use the highlighting, note, or tag function in Adobe to Edit the PDFs you will be submitting, this will affect formatting and legibility
  – There is an exception to this rule
    • You can input such formatting in Microsoft word and then convert the word doc to a PDF, and the formatting should carry over

• **Word of Caution: do not submit your portfolio without 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

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