Overview

• Changes to Evaluation Process due to COVID-19
• New API Integration
• Types of Evaluations
• Brief intro to Range Elevations
• Background information on Evaluation Process
• Tips for Assembling the WPAF
• FAR Website Resources
• Interfolio Introduction
• Interfolio tips
• Interfolio Demonstration
Lecturer Evaluation Changes due to COVID-19

- ALL Lecturer Evaluations will be submitted through Interfolio as of 2020-2021
- The Rebuttal Period portion of the Lecturer Evaluation cycle will be conducted via Interfolio
- The WPAF Checklist will now be incorporated into the Interfolio Review Packet
  - It does not need to be filled out hard copy
  - It does not need to be emailed to your Chair
- See link for more details about COVID-19 changes, http://www.fullerton.edu/far/covid19/
New API Integration

• FAR has been working with IT to create an API integration to directly import all required SOQ and Grade Distribution data into Interfolio review packets
  – Range Elevation Interfolio cases are excluded from this

• This import was recently, successfully completed, but Faculty members under review will still potentially need to do the following:
  – Rearrange documents into a logical order
  – Rename imported documents with a clear and logical naming convention
  – Delete imported documents that are not pertinent to the department they are being evaluated for
Types of Evaluations

• There are several types of Evaluations that both Full-time and Part-time Lecturers can be scheduled to undergo
  – Annual Periodic
  – 3-Year Periodic (also known as a Year 3 of 3 periodic)
  – 6-Year Comprehensive

• What type is determined by the length of your employment at CSUF and by the appointment specified in your contract
Range Elevation Evaluations

• There is a *separate* evaluation that eligible Lecturers can participate in in the Spring Semester, known as Range Elevation
  – This type of evaluation is essentially a request to be moved to the next highest salary range
  – The final decision is made by the Provost

• To undergo a Range Elevation *Requires* the following:
  – Your Name *must* be on the List of Eligible Faculty, published on the [Range Elevation page](#) on the FAR Website
    • This list is compiled and created by HRDI, not FAR
    • The Eligibility list is published in the Spring Semester
  – The completion and submission of the declaration form to the FAR office
Period of Review

- Each evaluation type requires different volumes of documentation depending on the length of your employment at CSUF
  - Annual periodic
    - Covers the period since your last evaluation (2 Semesters) or from your first semester of teaching if this is your first evaluation at CSUF (1 semester)
  - 3-Year Periodic
    - Covers 2 ½ years (5 semesters) worth of academic and professional activities that have occurred since the beginning of your 3-year contract
  - 6-Year Comprehensive
    - Covers 5 ½ years (11 semesters) worth of academic and professional activities, since the date of hire through the current submission deadline for the WPAF
## Summary of Levels of Review

<table>
<thead>
<tr>
<th>Evaluation Type</th>
<th>Chair Reviews</th>
<th>DPRC Reviews</th>
<th>Dean Reviews</th>
<th>Provost Reviews</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full-Time Lecturer</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Periodic</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>3 Yr Periodic</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>6 Yr Comprehensive</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Range Elevation</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Part-Time Lecturer</strong></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Periodic</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Yr Periodic</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Range Elevation</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
**Review Process for Lecturer Evaluations**

<table>
<thead>
<tr>
<th>Process Step</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Faculty Member Submission</strong></td>
<td>- Faculty member submits WPAF materials through Interfolio</td>
</tr>
<tr>
<td></td>
<td>- Faculty emails Chair a completed copy of the WPAF checklist</td>
</tr>
<tr>
<td><strong>Department Chair Declares Complete</strong></td>
<td>- Chair checks to make sure that all materials have been submitted</td>
</tr>
<tr>
<td></td>
<td>- Signs WPAF Checklist</td>
</tr>
<tr>
<td></td>
<td>- Forwards case to Departmental Review level</td>
</tr>
<tr>
<td><strong>DPRC Review Step</strong></td>
<td>- DPRC reviews all submitted material</td>
</tr>
<tr>
<td><strong>DPRC Chair Initiates Rebuttal period</strong></td>
<td>- DPRC Chair emails a copy of the DRPC’s evaluation to the Faculty Member</td>
</tr>
<tr>
<td></td>
<td>- Faculty member acknowledges receipt and chooses whether or not to submit a rebuttal</td>
</tr>
<tr>
<td></td>
<td>- Case is forwarded to the Department Chair</td>
</tr>
<tr>
<td><strong>Department Chair Review Step</strong></td>
<td>- Department Chair reviews all submitted material</td>
</tr>
<tr>
<td><strong>Chair Initiates Rebuttal Period</strong></td>
<td>- Chair emails copy of his or her Evaluation to the Faculty Member under review</td>
</tr>
<tr>
<td></td>
<td>- Faculty member acknowledges receipt and chooses whether or not to submit a rebuttal</td>
</tr>
<tr>
<td></td>
<td>- Case is forwarded to the Dean</td>
</tr>
<tr>
<td><strong>Dean Review Step</strong></td>
<td>- Dean reviews all submitted material</td>
</tr>
<tr>
<td><strong>Dean Initiates Rebuttal Period</strong></td>
<td>- Dean emails copy of his or her Evaluation to the Faculty Member under review</td>
</tr>
<tr>
<td></td>
<td>- Faculty member acknowledges receipt and chooses whether or not to submit a rebuttal</td>
</tr>
<tr>
<td></td>
<td>- Case is forwarded to the Dean</td>
</tr>
<tr>
<td><strong>FAR Final Processing</strong></td>
<td>- FAR audits the file for completeness</td>
</tr>
<tr>
<td></td>
<td>- Files all necessary evaluation material in PAF</td>
</tr>
<tr>
<td></td>
<td>- Closes Interfolio case</td>
</tr>
</tbody>
</table>
New Process for Rebuttal Period

1. The Rebuttal Period will be conducted entirely through Interfolio.
2. You will get an email from noreply@interfolio.com
   a. From this email you will be able to login to Interfolio, to see files that were shared with you by your review committees.
3. Read the documents shared with you in the Interfolio platform.
4. Use the Lecturer Rebuttal Form to indicate your decision of whether you are going to submit a written rebuttal statement and/or request a meeting with the committee.
   a. If you do submit a written rebuttal statement, include it in the appropriate area of the Lecturer Rebuttal Form.
   b. Upload the completed Lecturer Rebuttal form in Interfolio as your “response” to the documents shared with you.
5. All responses are due 10-calendar days after you receive the email from noreply@interfolio.com.
   a. This is a HARD Deadline.
Tips for Assembling the WPAF

• 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
  – 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 WPAF 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

• Expect to prepare a WPAF for evaluation EVERY year, except if you are in years 1 or 2 of a 3-year appointment OR are notified otherwise
Tips for Assembling the WPAF
Continued

• Become familiar with the Interfolio template for Lecturer Evaluations
  – The Interfolio template is based on UPS 210.070 and contains 12 categories
• All WPAF documents should be arranged in Reverse Chronological Order, newest on top, oldest on bottom
  – Unless specified otherwise by your department
• Checklist Form now included in the Interfolio Review packet as form you will need to fill out
• **Table of Contents**: Complete this document last
• Faculty Portal contains:
  – Website: https://my.fullerton.edu/Portal/Dashboard/
  – Statistical Summaries of Student Opinion Questionnaires (Statistical Course Reports)
  – Completed Student Opinion Questionnaire Forms (Raw Data)
  – Statistical Summaries of Grade Distributions (Graded Class Lists): [Graded Class Lists Tutorial](https://my.fullerton.edu/Portal/Dashboard/)
FAR Website Resources

• FAR’s website: [http://www.fullerton.edu/far/](http://www.fullerton.edu/far/)

• There are now new, updated pages for every type of evaluation overseen by the FAR office
  – Lecturer Evaluations
    • Separate Pages for both Full-Time and Part-Time Lecturers
  – Range Elevation
    • Is open to both Full-time and Part-time Lecturer, who are declared eligible by HRDI
Part-Time Lecturer, Full-time Lecturer, & Range Elevation Pages

• These pages have been reorganized to have nearly identical information on them to:
  – Lessen the confusion surrounding the evaluation 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 Evaluation process
  – Full-time Lecturer Faculty
  – Part-Time Lecturer Faculty
  – Range Elevation

• FAR has also prepared new pages for blank SOQ forms and Departmental Standards for Lecturer Faculty (For those that have them)
  – SOQs
  – Department Standards for Lecturer Faculty (DSLF)
Screenshots of the New Pages

**Part-Time Lecturers**

**Full-Time Lecturers**
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 Lecturers are required to submit their WPAF through Interfolio.
  – ALL Range Elevations are required to be submitted through Interfolio
• As CSUF faculty members, you have access to 2 interfolio products
  – Review, Promotion, and Tenure (an email is 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 in the Login Process
  – 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

• **WPAF** – refers to a collection of documents that faculty members submit to a set of overseeing committees for evaluation

• **Case** – refers to the most current Interfolio packet created for a faculty member, where he or she can upload WPAF documents
  – Also known as the “Review Packet”

• **Review packet section** – refers to a specific category of documents that a faculty member submits as part of a whole, for evaluation
Interfolio Tips

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

• Tutorials Available on all FAR Lecturer Evaluation pages, under the “Interfolio Tutorials” drop down menu

• 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 before you start uploading
  – 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 Continued

• 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

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

• There are three methods to log into Interfolio
  – #1 going through the CSUF portal: https://my.fullerton.edu/Portal/Dashboard/
    • Can also access SOQ and Grade Distribution data from here
  – #2 going directly to the Interfolio Log-in Page (make sure to bookmark as a favorite): https://account.interfolio.com/login
  – #3 Clicking the “View Case” button in the body of the notification email you received from noreply@interfolio.com
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